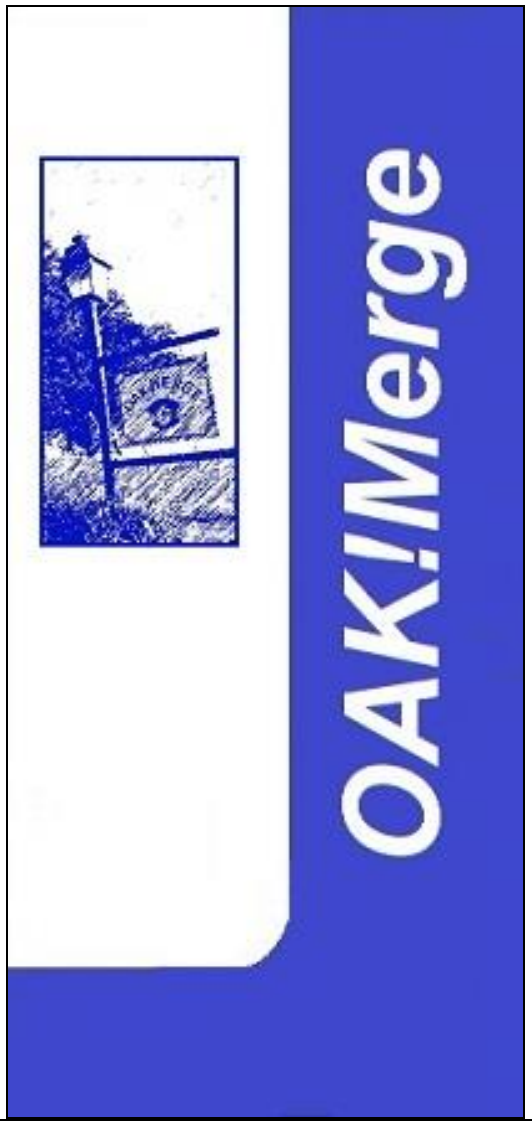
OAK!Merge User's Guide

Version 18.1.1 Revised December 8, 2015



User Guide v18.1.1

OAK!Merge is the leading data import, export and update utility for

act!™

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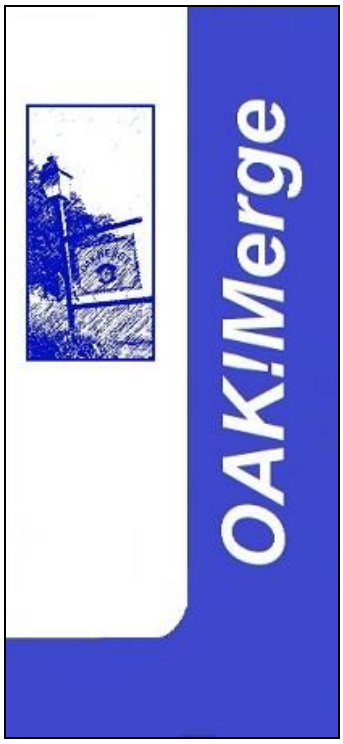
What OAK!Merge can do for you:



- Unlimited uses: update sales info in Act! with mainframe data matching on customer number, update sales territory matching on zip codes, import trade show or web leads, etc.
- Add, Update, Skip or Delete records from any of Act!'s "updateable" tables: Contact, Group, Company, Product, Opportunity, or Custom Tables. Match on one or more fields for updating
- Append data to Notes, History or Activities and link them to Contacts, Companies, Opportunities, or Groups. Delete History and notes.
- Export all data in a selected table
- Import Act! Users or Copy Users from one Act! database to another
- Use with unlimited number of Act! databases
- Updates ONLY the Act! fields you specify. All other Act! data remains unchanged
- Allows constants, key words, or transformations to be done as part of mapping the data
- Adds Contacts to be members of static groups
- Provides "mapping" to define which field(s) to update and which field to match on; maps can be saved & reused later. Profiles include mappings
- Profiles also allow saving Source files and Target files as well as the mapping
- Run OAK!Merge from a scheduler in unattended batch mode

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User's Guide

Preface

Warning! OAK!Merge updates your **Act!** database. Make a backup copy of your database before using this product. **ALWAYS** execute a sample request on a test **Act!** database before using **OAK!Merge** on your production database.

Disk Space Caution: Each time you execute a merge, **OAK!Merge** can create a log file that contains specific information about each contact record processed by **OAK!Merge**. Make sure you have enough disk space to hold a potentially large file.

Caution: If you merge data into **Act!** fields that have the History attribute on, **Act!** creates a History record for each field updated. If Synchronization is enabled, **Act!** creates a record for the Transaction Synchronization Log Database.

Use Caution When Updating Contact Names. First Name, Last Name, Prefix, Suffix are **not** updatable fields. See Appendix 2 on Contact Name updates for more info. When using an **OAK!Merge** action that updates the Contact field, **OAK!Merge** automatically updates the First Name, Last Name, and Salutation fields according to **Act!** Preferences for Names. Contact names can be blank, but a period is inserted as the last name as a place holder. It can be deleted in Act!."

TIP: If you are matching and adding and you have multiple rows for the same contact; OAK!Merge recognizes that as a duplicate and will only take the first one to update the matching contacts. Blanks count as valid data to match on.

You can sort the CSV in date order before importing it; to get the one you want used for your import.

NOTE: If **Act!** is open, you must Refresh to see the data updates.
VIEW REFRESH

See the warranty section for terms and conditions of use.

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Section 1: Overview of OAK!Merge

OAK!Merge Versions: There are 6 versions of **OAK!Merge** currently released: Trial, Basic, Standard, Advanced, Pro and Enterprise. You can purchase at any level and upgrade to any level.

- Basic version includes merges to Contacts and Companies
- Standard version also includes merges to Notes, History and Groups
- Advanced version also includes merges to opportunities, activities, products, unattended merges, EXCEL and ACCESS support
- Pro version also includes Secondary Contacts, Custom Act! Tables and Act! Table to Act! Table Merges
- Enterprise Version with Salesforce Data Migration Kit imports data from a Salesforce data backup into Act! with one click.

OAK!Merge 17 is compatible with **Act!** 9, 10, 11, 12, 13, 14, 15, 16 and 17, i.e. **Act!** v17.1 and 17.2 (2015) PRO, Standard, Corporate, Premium and the **Act!** for Web server.

Not all current features of OAK!Merge will work with previous versions of Act!

OAK!Merge internal code generations share code and features:

- Gen 1: Act! 4, 5, 2004 and 6 (these use OAK!Merge v6 only)
- Note Act! 2005 v7 and 2006 v8 versions are not supported by OAK!Merge
- Gen 2: Act! 2007 v9 and 2008 v10.0
- Gen 3: Act! 2008 v10.2 and 2009 v11
- Gen 4: Act! 2010 v12, 2011 v13, 2012 v14, 2013 v15, v16, and v17.

See the Feature Roadmap in Appendix 3 for more information and details.

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Section 2: Using the OAK!Merge Wizard

After initial installation, **OAK!Merge** will operate in Free Trial mode for 10 days and write up to 10 records per merge. After 10 days, if it has not been activated, it will not allow Trial runs to update Act!. It may be activated to use more features at any time without reinstalling via the Tools button. See Activation section below for more information.

OAK!Merge uses a simple 1-2-3-4 wizard. There is a welcome screen were you can pick a predefined merge via a Profile or you can configure and execute a merge in 3 more steps

1. Welcome ; pick an existing profile or Next button
2. Pick source and target data sources
3. Map data and select matching/linking options
4. Execute

This manual goes through examples of merges to each area of Act! using the Act! demo database as a target. The sample source fields are in the OAK!Merge Samples file folder.

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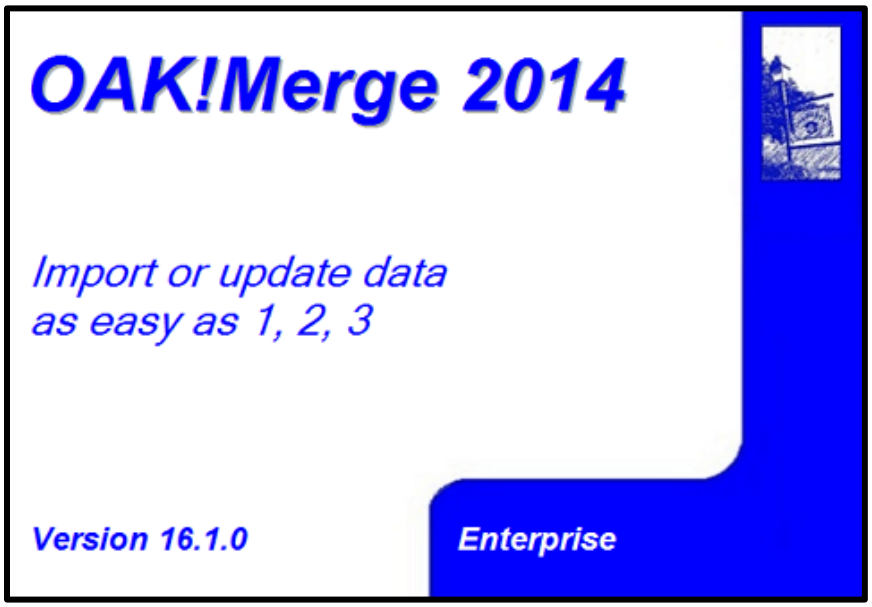
Example 1: Merge FROM a CSV to Act! Contact Fields

Start **OAK!Merge**:
After installation you will find the **OAK!Merge** program in START, **OAK!Merge** for **Act!**

The splash screen appears when the program launches



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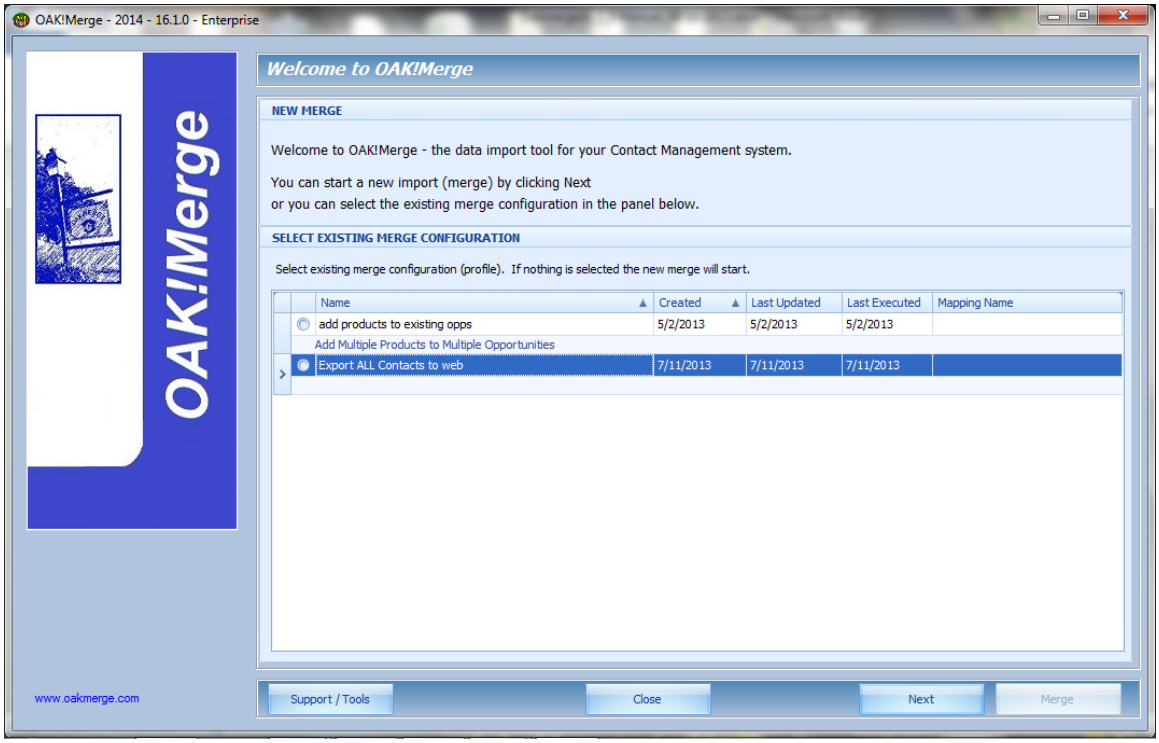
Step 1 of 4: Beginning a New Merge

Page 1 of the Wizard will appear. Here you can select an existing merge configuration called a "Profile" if any have been saved. In the screen shot below, 2 existing Profiles have been previously saved. This feature is discussed later.



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MATCHING vs. LINKING:

OAK!Merge merges or appends data from an external file into an **Act!** database on a field-by-field basis. You can use a variety of import source files as your input, you specify one or more **Act!** fields to match on, and you can specify the **Act!** fields to update. You can also link some records to others, such as linking a history record to a contact. In OAK!Merge terms Matching is to find and update an existing record, whereas Linking is to connect 2 records together. Merges do not have to use matching or linking to just add records to Act!

OAK!Merge supports the following relationships to connect one record to another
- linking contacts to companies
- linking contacts to groups
- linking companies to a parent company
- linking group to a parent group
- linking opportunity to contact, company
- linking note, activity, history to a company, contact, opportunity

Linking is handled by GUID, Name or OAKMergeID of the corresponding record (groups do not have OAKMergeID). A GUID is unique internal ID Act! uses. It is an acronym for Globally Unique Identifier

A key capability in OAK!Merge is you decide IF you need to match (to update) and then what to do if you match versus what to do if you don't match. This means you can specify what action to take if data in the input file matches records in the **Act!** database and what action to take if data in the input file does **not** match any records in the **Act!** database. **OAK!Merge** updates only the specified field(s) in the **Act!** database; all other **Act!** fields remain unchanged.

If you don't select any fields to match on then you will append all the records. You can still do linking if you are using matching or not.

OAK!Merge dedups the source file using what you select as matching fields.

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You are guided through the **OAK!Merge** process in three main steps using Wizard-style screens. Each step focuses on various options, selection criteria and field mappings specific to a merge. You can save the settings for a merge in a named data map for repeated use with future merges.

There are six buttons available on some of the Wizard screens:

- **Tools/Support:** View the support, activation, and documentation of **OAK!Merge**
- **Close:** Exit **OAK!Merge**
- **Back:** Move back to the previous Wizard screen
- **Next:** Move forward to the next Wizard screen
- **Start Over:** Start at page 1 of the Wizard
- **Merge or Run:** Perform the merge

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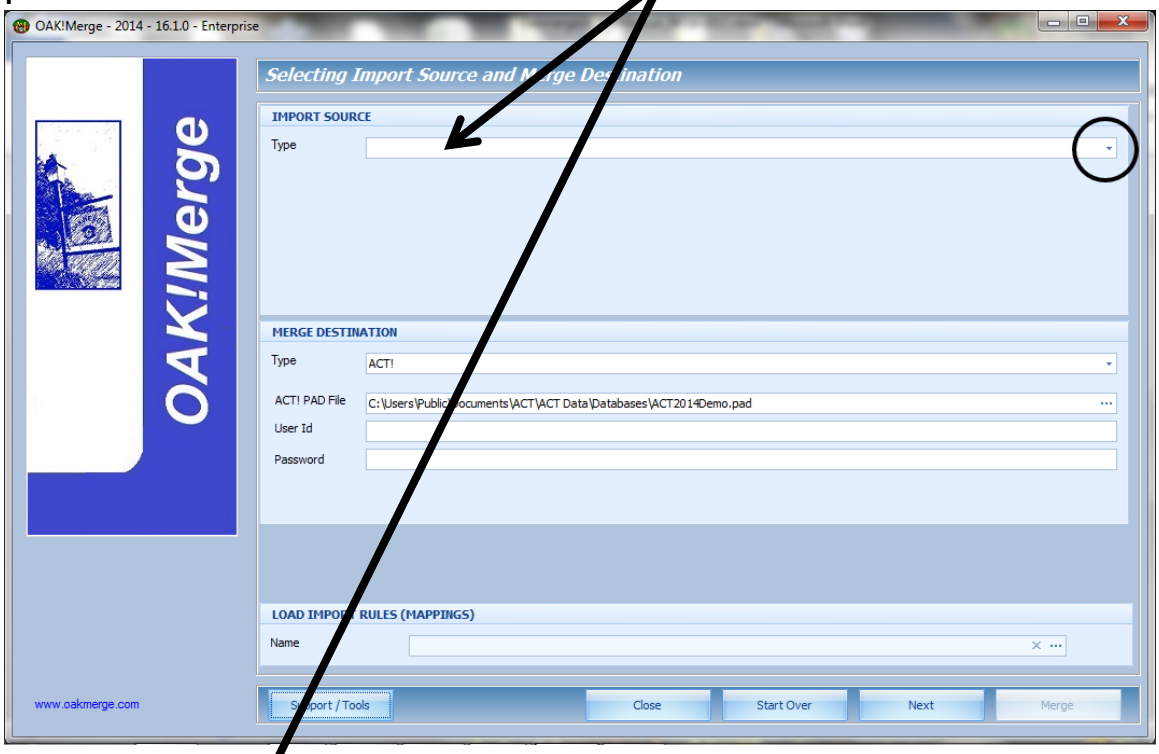
Click on Next

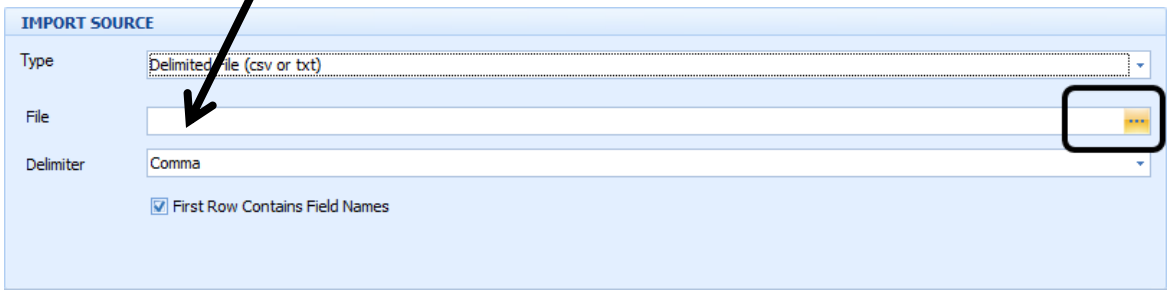
Screen 2 of the Wizard appears: Selecting Merge Destination and Import Source.

Browse to an import source file by selecting Delimited for TYPE and clicking on the 3 dots at the end of the File box to select a CSV to TXT file.

Or double click in the white area of the file name box

.





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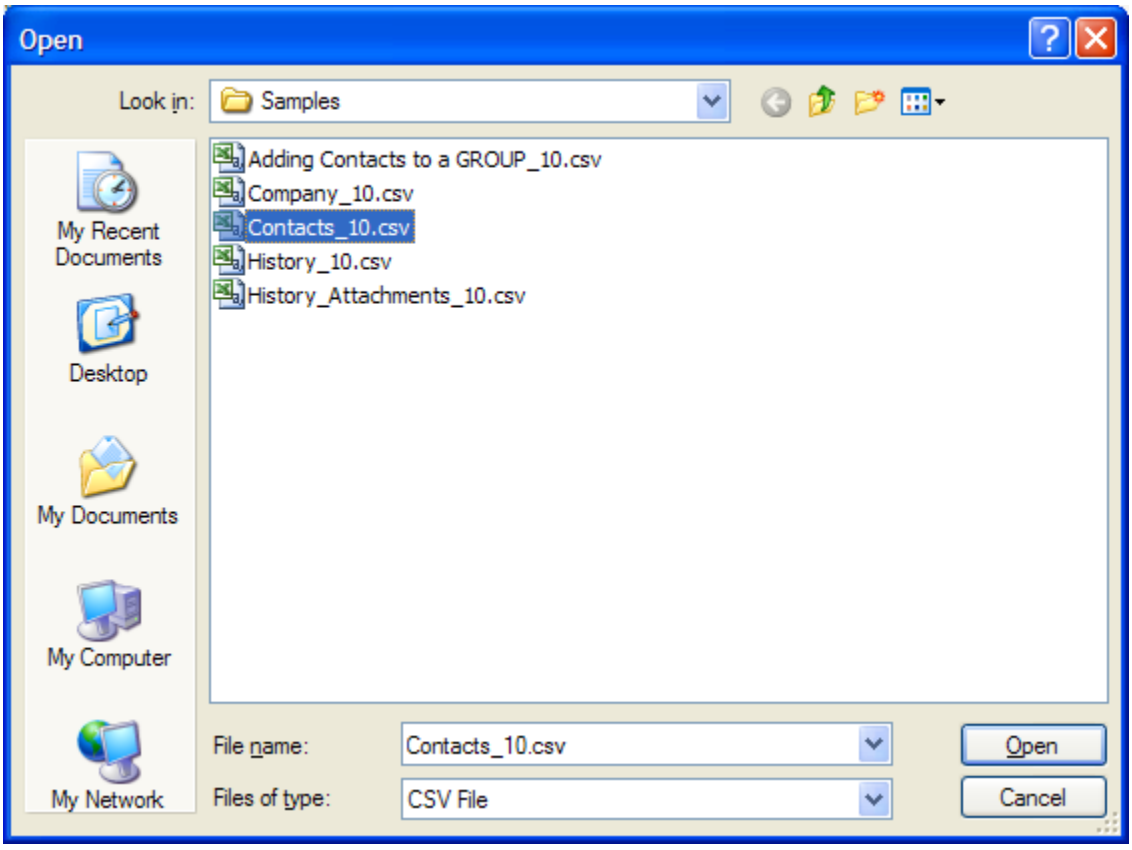
There are samples included in the Samples folder to test with the **Act!** Demo database.

A typical location for the sample import data files is:

C:\E Tech Systems\ACT\OAK!Merge 17\Samples



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Company	Contact	Phone	Title	Address1	Address2	City	State	ZIP	end
Boomer's Artworx	Emily Dunn	(602) 555-4874	Sales Representative	8907 E. Rosebud Lane	Suite 25	Scottsdale	AZ	85258	end
Boomer's Artworx	Bettie James		Sales Representative	8907 E. Rosebud Lane	Suite 25	Scottsdale	AZ	85258	end
Corleone's Pasta Company	Morty Manicotti	(480) 555-4512	Director of Manufacturing	8800 Pasta Way	Suite 200	Scottsdale	AZ	85258	end
Duke Industries	Nathan Cutting Brittles	310-622-1507		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Marion Morrison	310-622-1500	Founder	4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Kirby York	310-622-1506		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Duke Industries	Ethan Edwards	310-622-1501		4075 Santa Monica Frwy		Los Angeles	CA	90029	end
Jake Flakes Inc.	Bella Minoal		Consultant	1680 N. Deville Dr.	Suite 40	Tempe	AZ	85281	end
Mad House;The	Greg Hart	(310) 555-2244	President	22 Acacia Ave.		Manhattan Beach	CA	90266	end
Yellow Jersey Bikes	Ashley Allan	(619) 555-8890	VP of Sales	315 Center Dr.	Suite 100	San Diego	CA	92109	end

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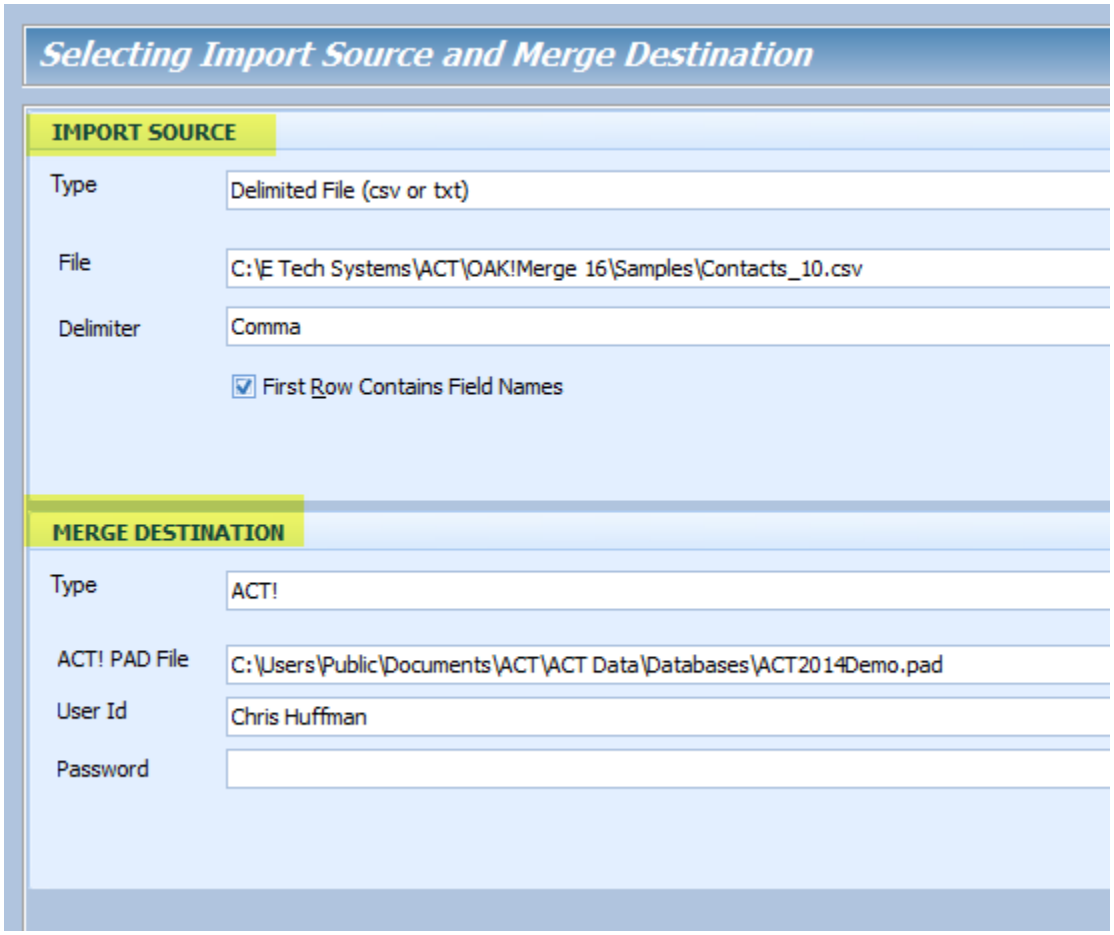
Select the Import Source and Merge Destination
Below is a CSV going into an Act! database
If you want to export, then the Source is Act!.



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Step 2 of 2: Select the Source and Destination

Identify the source/ input file, the **Act!** target database, **Act!** user name and password (if necessary), location of the mapping database and the specific data map to use.

FROM: the IMPORT SOURCE

Type Text delimited files are supported in Basic and Standard versions. Excel, ACCESS, and XML are supported in Advanced and Pro versions and **Act!** to **Act!** in the Pro version.

File Specifies the full pathname for the input file containing the data to merge into the target **Act!** database. Click the Browse button to select the input file.

Delimiter Comma or TAB

TO the MERGE DESTINATION

File This is the target **Act!** database. It specifies the full pathname for the **Act!** database to update with data from the input file. Click the Browse button to select the database. The target **Act!** database can be open or closed at the time of the merge.

IF you are exporting, the Destination can be ACT, Delimited, or XML

User ID (Optional for single user databases) Specifies the user name used by **OAK!Merge** to log on to the target **Act!** database. All changes made during this merge are recorded with this user name.

Password (Optional for single user databases) Specifies the password for the user name used to log on to the target **Act!** database.

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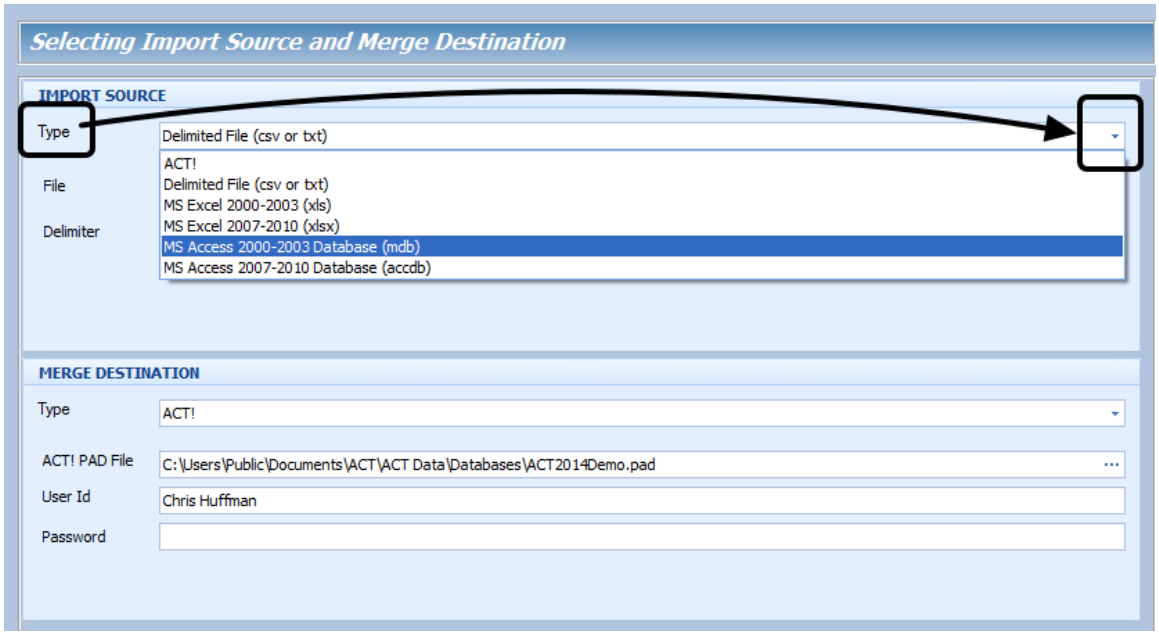
Click on Next
If you have the Advanced or PRO version you can pick other data types such as MS EXCEL for your input source type. ACCESS and EXCEL 2000 through 2013 are supported. XLS XLSX mdb or accdb or XML

You need to have Excel or Access installed to see all the options. On some systems the XLS and MDB options will work even if excel or Access are not installed.



TIP: **OAK!Merge** also has **Act!** as a source for Act! To Act! Merges of some of the tables; and for exporting. You can use the COPY UP button to copy the lower panel to the top one so you have ACT the source and destination. You can merge ACT to ACT within the same database or between 2 different ones.

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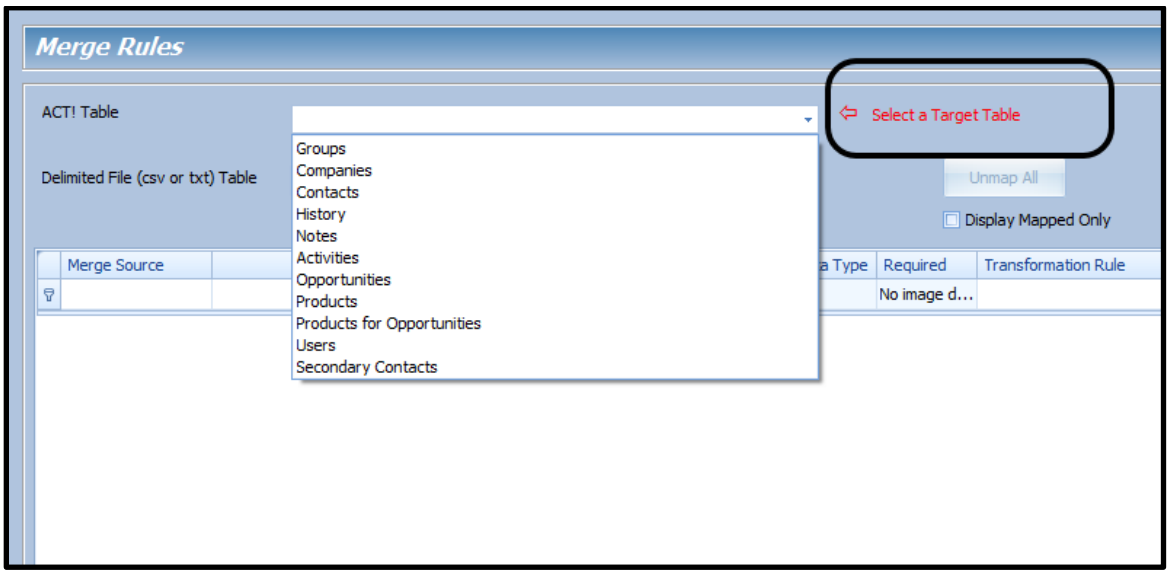
Step 3 of 4: Select Target Table and Map Fields

The Next Screen has the mappings. First select the Target Table (no mappings/fields appear until you select a target table). This is where you need to put the data in Act! You cannot update more one table per merge. You can create a batch file to merge data to several tables in one operation by chaining several predefined merges together. See unattended merges section.

The PRO version displays the tables below as well as any custom tables. The Standard version will only display the 5 tables it supports which are Companies Contacts, Groups, History and Notes.



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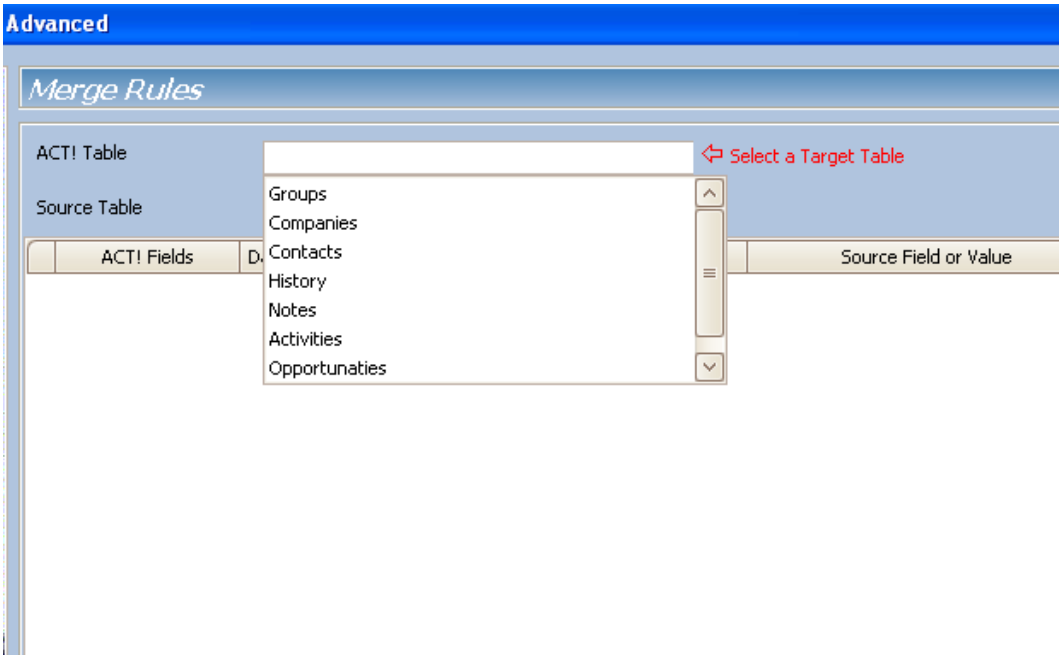
Different versions show different tables. Advanced version has additional tables: Activities and Opportunities.



In the Advanced or Pro version, you can pick the worksheet name or table/query name to use if you are using Excel or ACCESS as an input source. Only one worksheet or table can be used in any particular merge. XML is also supported.

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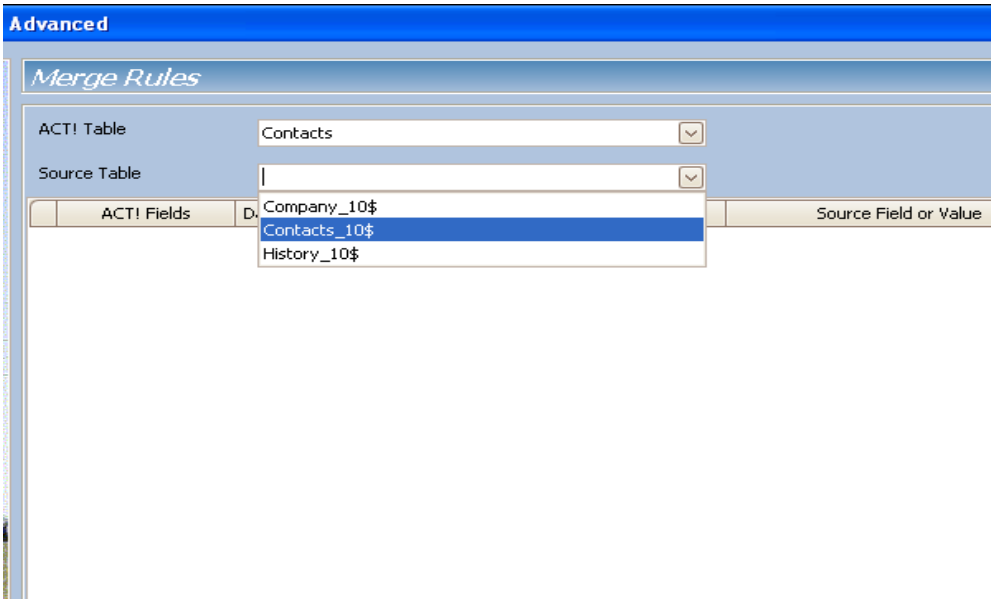

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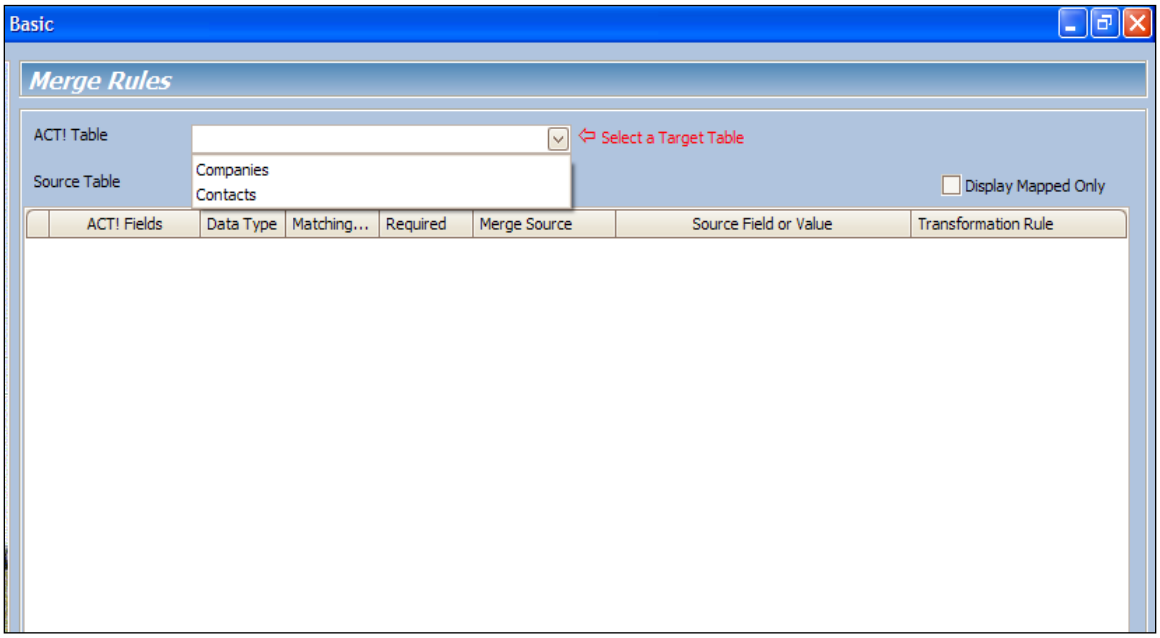
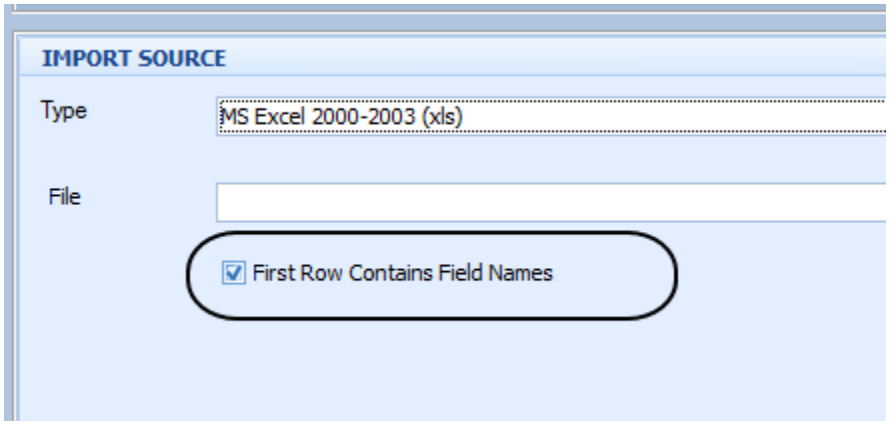
The BASIC version does not support exporting.
and looks like this:



Does your data have a with the names of the fields? There could be data or field names in row 1.

OAK!Merge always uses the first actual row as the field names, unless you uncheck the box for "First Row Contains Field Names" If your first row is data, then uncheck the box



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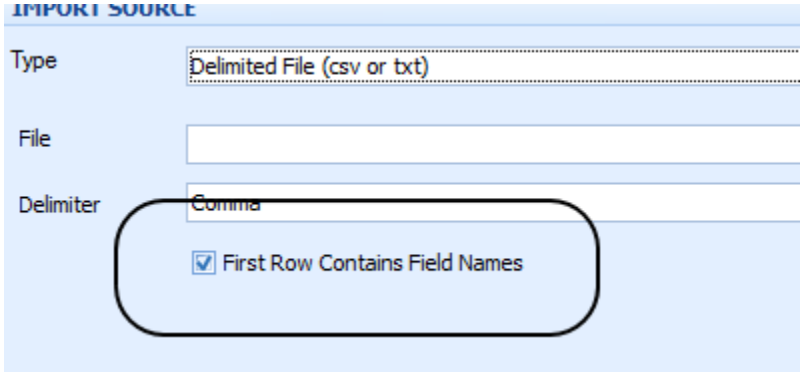

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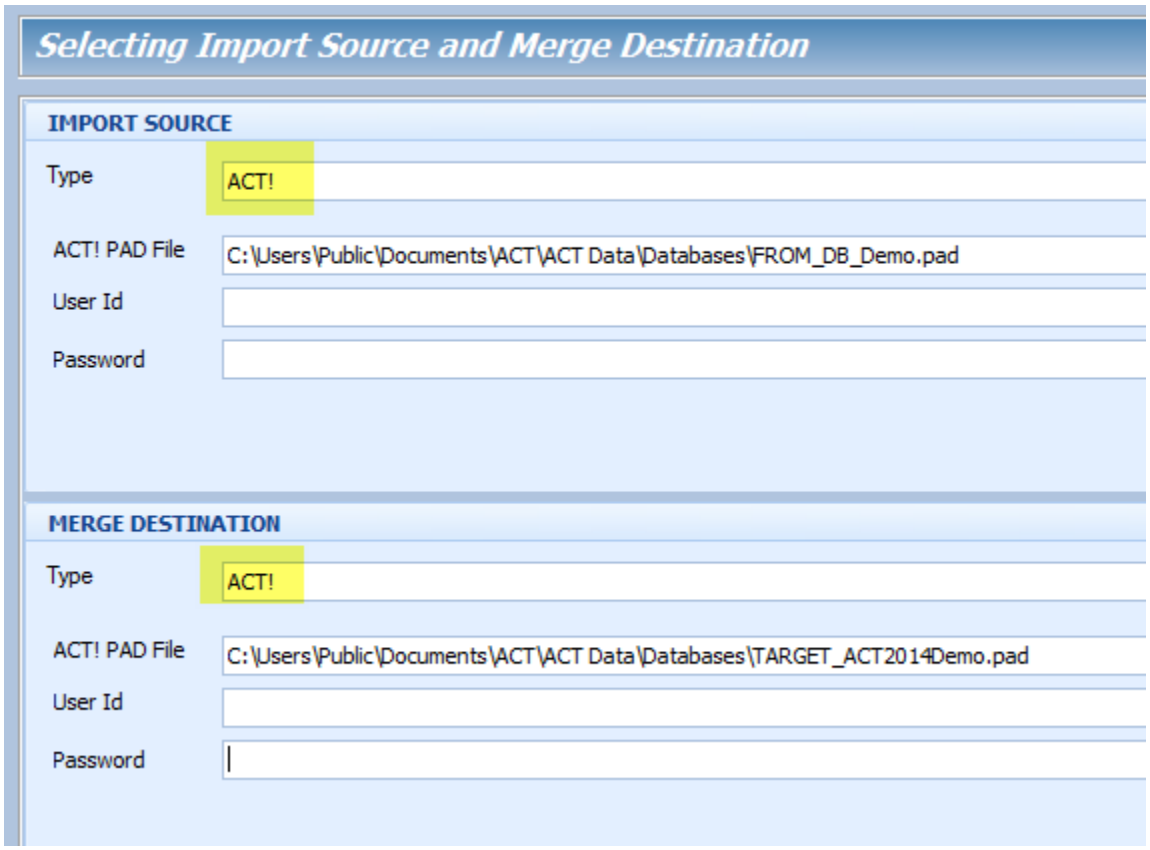
The Standard and above versions add **Act!** as an Import source and export Destination



Mapping means specifying which field names in the import source are set to write to which field names in **Act!** If the first record contains field names, they can be used to aid the mapping process. The import fields that are named close to the **Act!** field names will automatically map. Those should be checked for proper mapping.

TIP: you can map each source field to multiple fields or no fields in the target.

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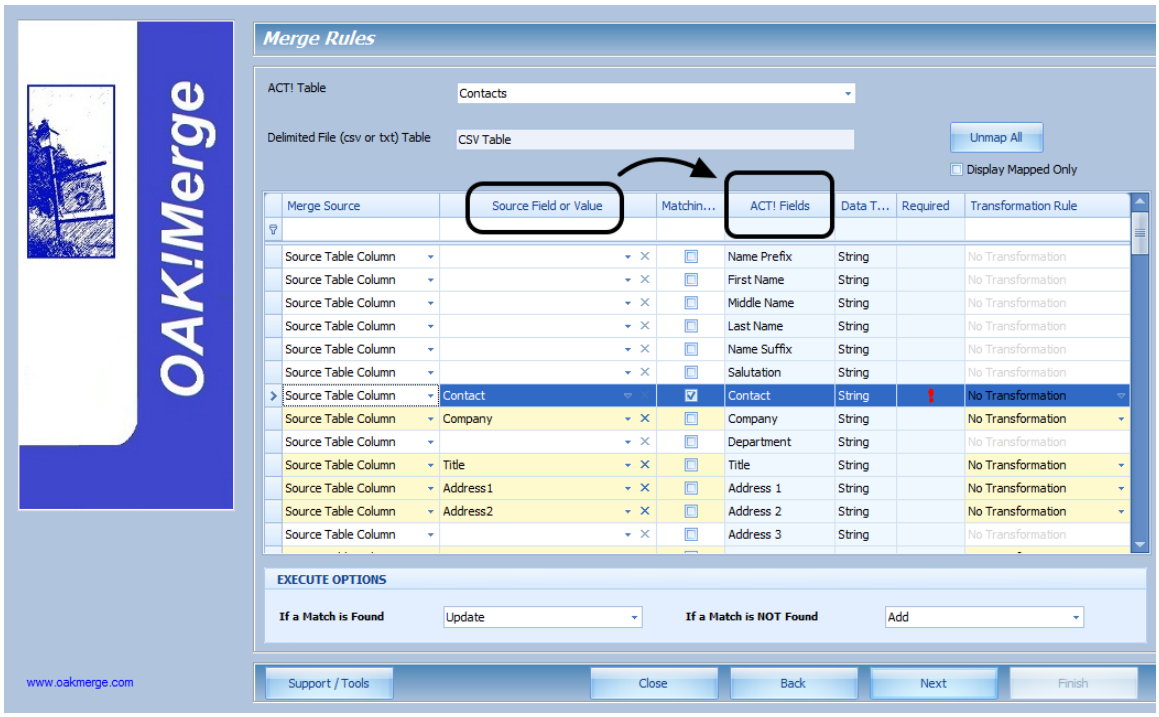
The unmapped fields should be mapped if they need to be updated in the **Act!** database. Fields are not required to be mapped to an **Act!** field.

Map from Source to Target.



The Matching checkboxes are the fields used to check to see if a record already exists in **Act!**. The Red ! in the "Required" columns indicate which fields are required (Red) when adding new records. . For example: Contact or First Name or Last Name must be mapped if ADDING a contact. However, the data can be blank. A period is inserted as a placeholder. This can be removed later in ACT via an EDIT REPLACE command from the main contact menu

The X at the end of the Source Field or Value field is to remove the mapping for that field. This is how you map to "none".

Below has one field selected for matching

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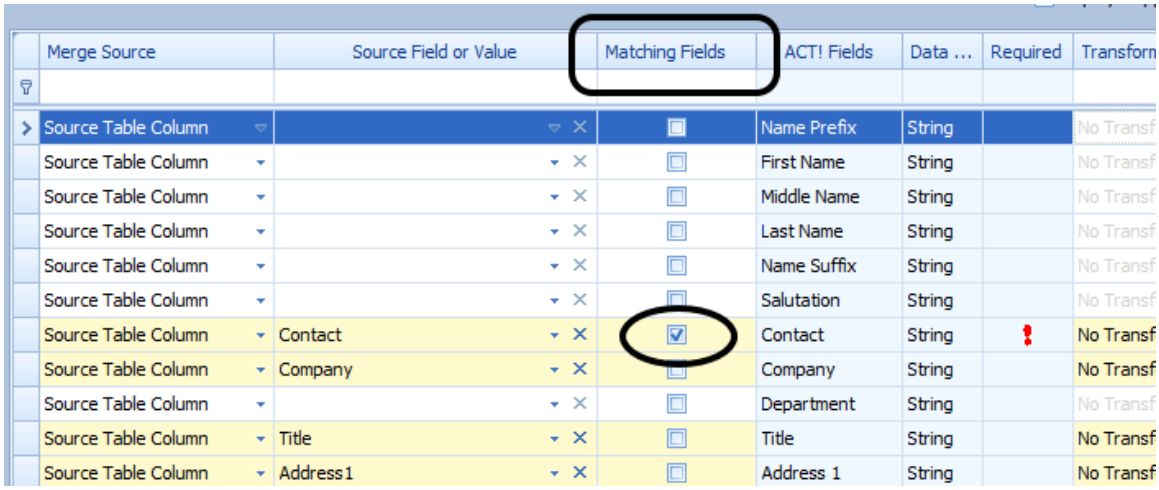
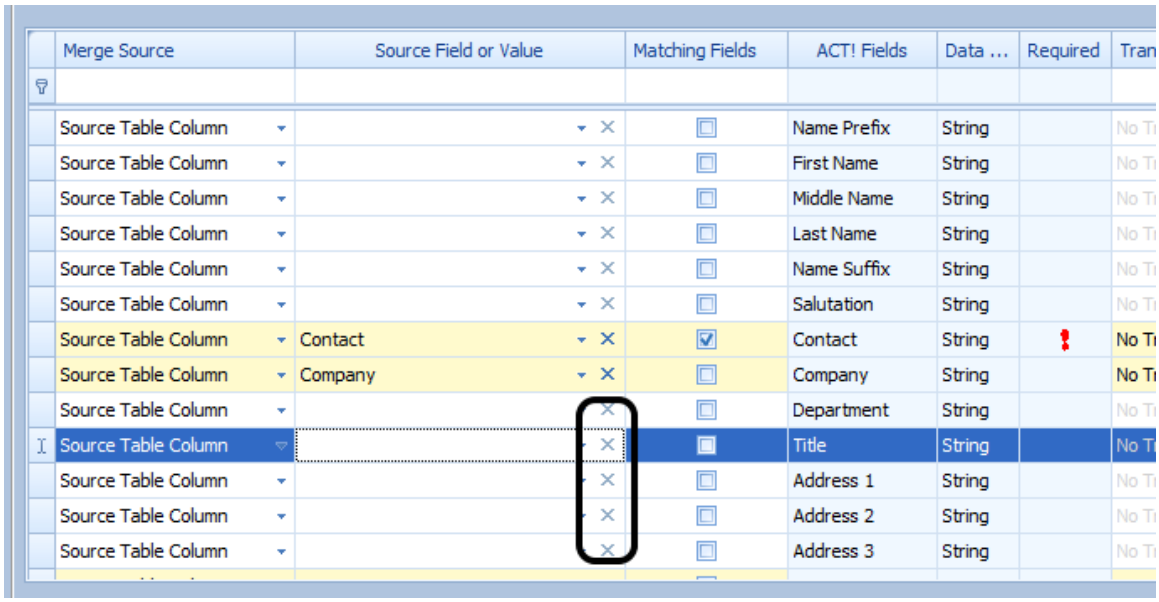


Chick on the X after Source Field to clear the mapping for any row that does not need to be mapped. Fields that are not mapped are not updated in Act!



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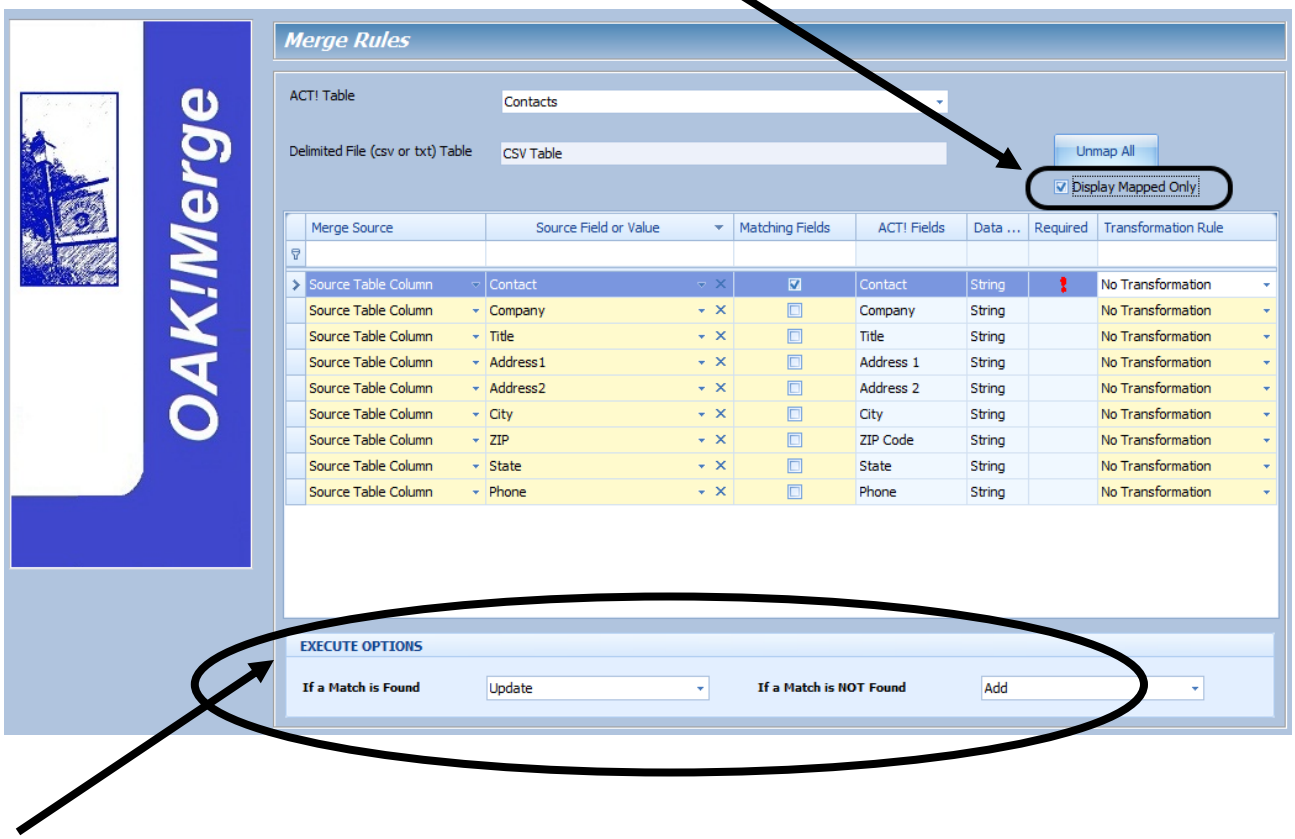
Checking "Display Mapped Only" shows less rows



Set EXECUTE OPTIONS at the bottom of the screen
If a match IS found, you can UPDATE, SKIP or DELETE the record
If a match is NOT found, you can ADD or SKIP the record

TIP: This option is a key feature of **OAK!Merge**. You may want to map incoming data differently if it matches or not. That would require 2 separate merges with different execute options and field mappings.

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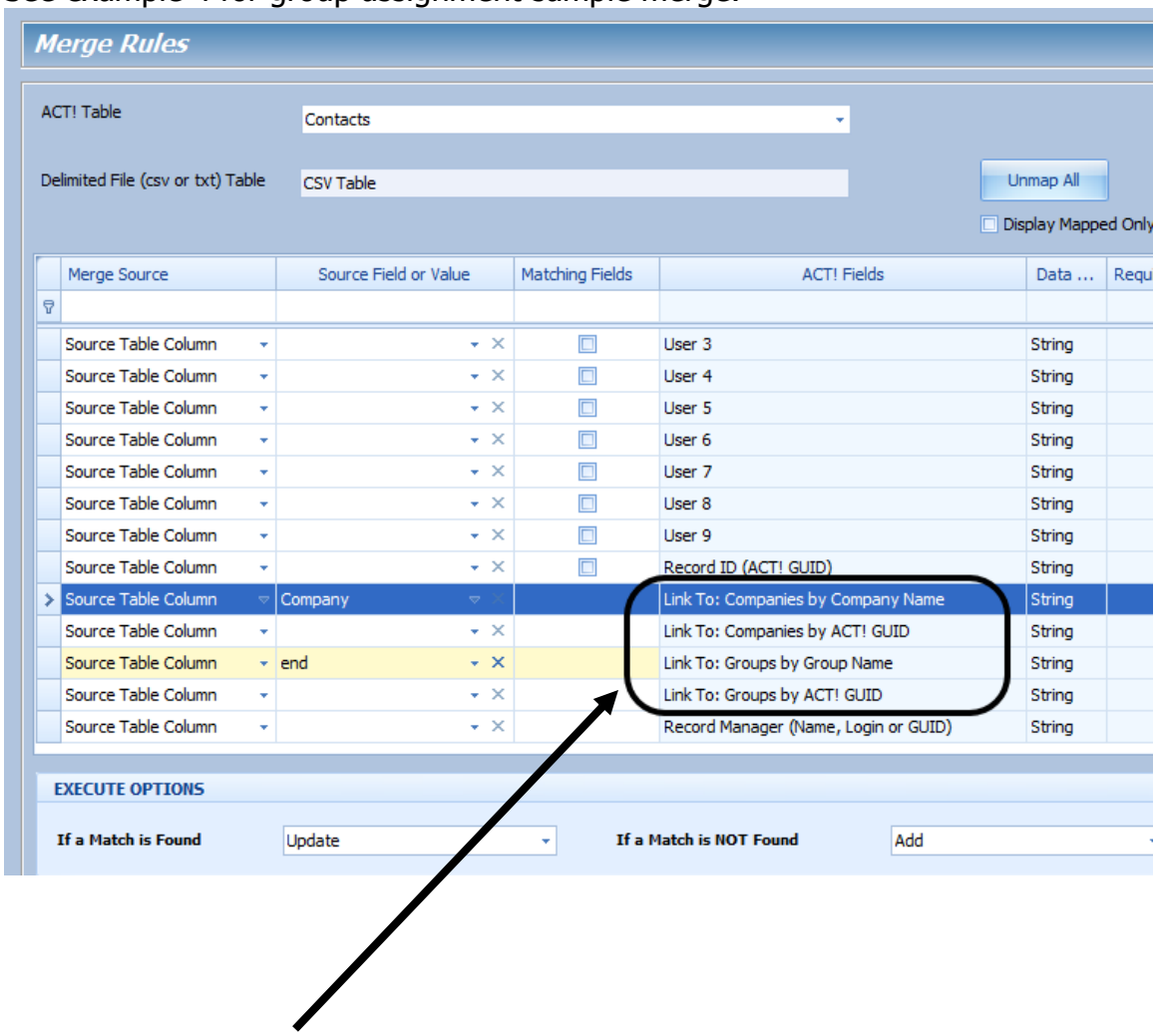
The next to last field in the mappings is "Link To: Group"
Contact records are automatically added to the specified group. The group must exist.

You can add each contact to a different static group or all contacts to the same group.

See example 4 for group assignment sample merge.



Contacts can be linked to existing Company records via the Link to Company by Company name or current GUID of the company. If a custom company field called "OAKMergeID" exists in the database, you will also get the option to Link the Contact to the Company using the OAKMergeID field.

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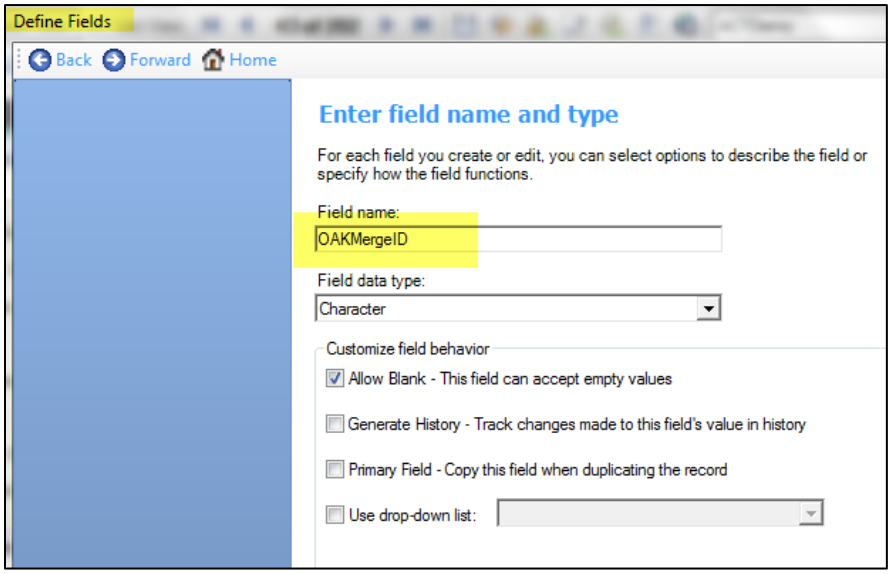
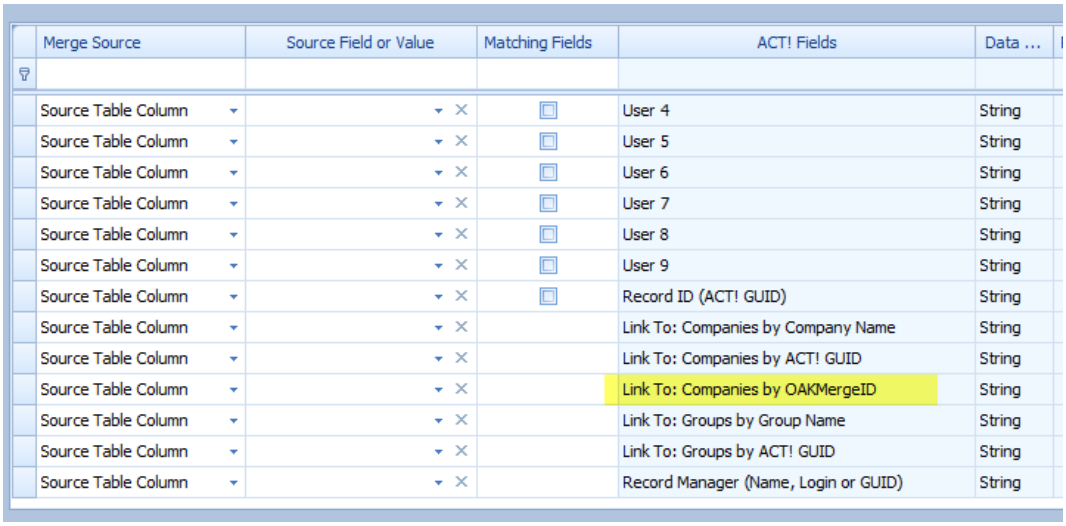
Adding the OAKMergeID field is done via define fields under TOOLS menu. It has to be spelled OAKMergeID with no spaces.
Leave the Field data type as Character. Numbers for Field data type does not work.


Define Fields
Back
Forward
Home
Enter field name and type
For each field you create or edit, you can select options to describe the field or specify how the field functions.
Field name:
OAKMergeID
Field data type:
Character
Customize field behavior
Allow Blank - This field can accept empty values
Generate History - Track changes made to this field's value in history
Primary Field - Copy this field when duplicating the record
Use drop-down list:

This gives you the option of using the custom field: OAKMergeID to link info to Companies. If you need to link info to Contacts or Opportunities, you will need a custom field in those tables too.



Merge Source	Source Field or Value	Matching Fields	ACT! Fields	Data ...
Source Table Column			User 4	String
Source Table Column			User 5	String
Source Table Column			User 6	String
Source Table Column			User 7	String
Source Table Column			User 8	String
Source Table Column			User 9	String
Source Table Column			Record ID (ACT! GUID)	String
Source Table Column			Link To: Companies by Company Name	String
Source Table Column			Link To: Companies by ACT! GUID	String
Source Table Column			Link To: Companies by OAKMergeID	String
Source Table Column			Link To: Groups by Group Name	String
Source Table Column			Link To: Groups by ACT! GUID	String
Source Table Column			Record Manager (Name, Login or GUID)	String

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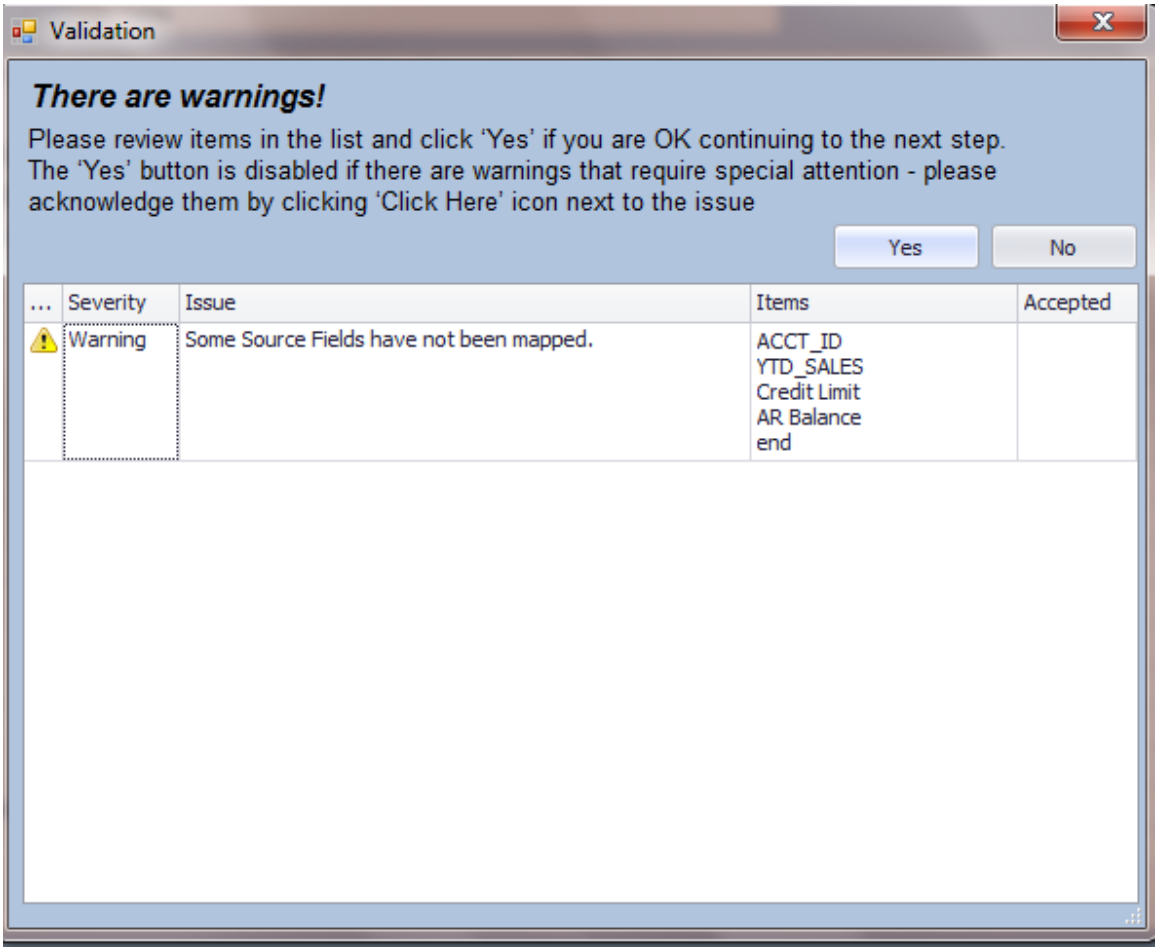
A warning in a validation dialog box will appear if some fields are NOT mapped or some are mapped more than once. "Yes" will proceed forward to the final wizard step; and "No" will go back to the mapping. "


Validation
There are warnings!
Please review items in the list and click 'Yes' if you are OK continuing to the next step.
The 'Yes' button is disabled if there are warnings that require special attention - please acknowledge them by clicking 'Click Here' icon next to the issue
Yes
No
... Severity Issue Items Accepted
Warning
Some Source Fields have not been mapped.
ACCT_ID
YTD_SALES
Credit Limit
AR Balance
end

TIP: if you add a new field to Act! with OAK!Mege open, you must Start OAK!Merge over to get the new Act! fields to show up in the mappings area.

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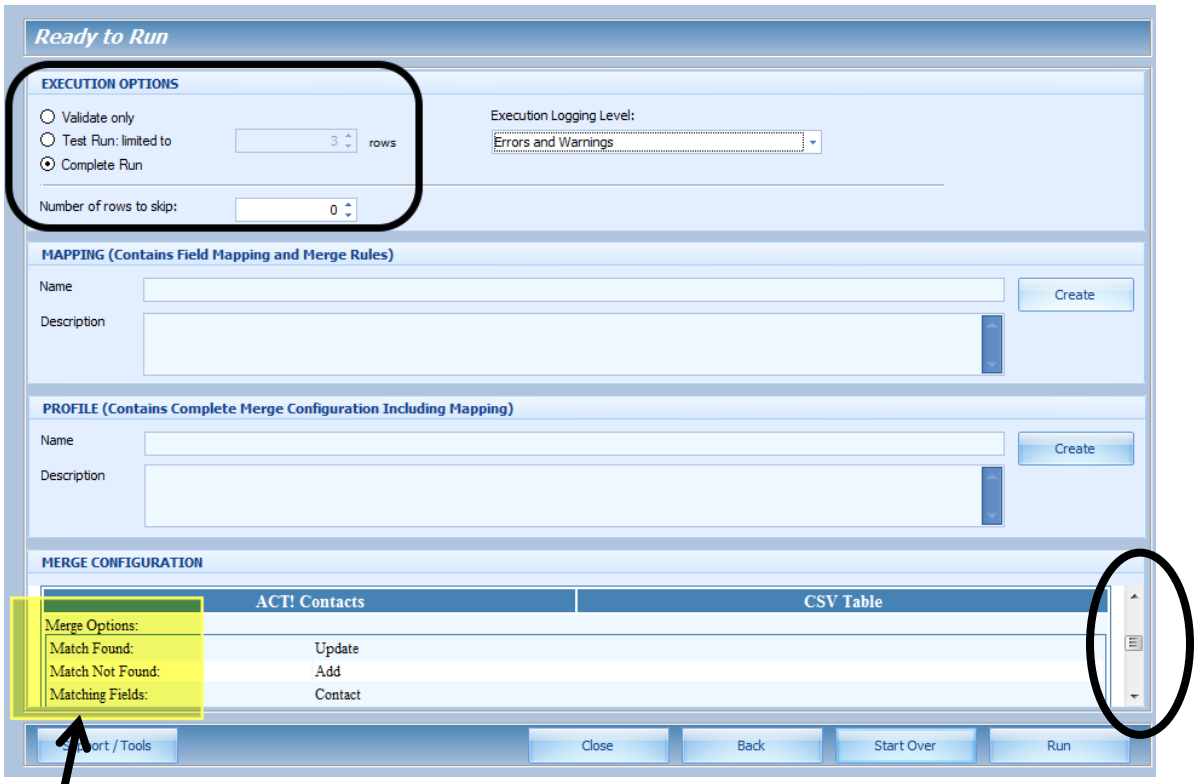
Step 4 of 4: Ready to Run

Select Execution Option and Execution Logging level at the top of the screen

Validate / Preview: A test merge for all records, that writes nothing to Act!
Test Run: Partial run; writes only the selected number of records
Complete Run: Complete merge that reads and writes all records



TIP: Always review the Match Found and Match Not Found options shown at the bottom carefully. If they are wrong, you will get very different results. You may have to scroll to see them.

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Number of Rows to SKIP: This is the count of rows that will be skipped from the beginning of the source file. This allows merges to start later on in the source file, not at the first record. It is an optional filter that works on all 3 executions options: Validate /Preview; Test Run, and Complete Run. Leave empty to skip 0 rows

For example if you have 5,000 rows in a CSV. You do a test merge of 100 and then want to run the rest. You need to start on row 101; so you SKIP 100 rows.

TIP: Excel puts a header at the top, so the row numbers are one more than the counts. If Jack Smith in on ROW 227 in excel and you want to start with him as the first row to process, would SKIP 225 rows

Note: the number of rows reported in the results page counts for "Skipped" is for those that were processed, and does not include these rows skipped at the beginning.

TIP: This feature allows you to run test merges of a few records that do not start with the first row. For example, you could run 3 tests of 25 records each, but each test starting at different points in the source file.

Click the run button to execute the merge.

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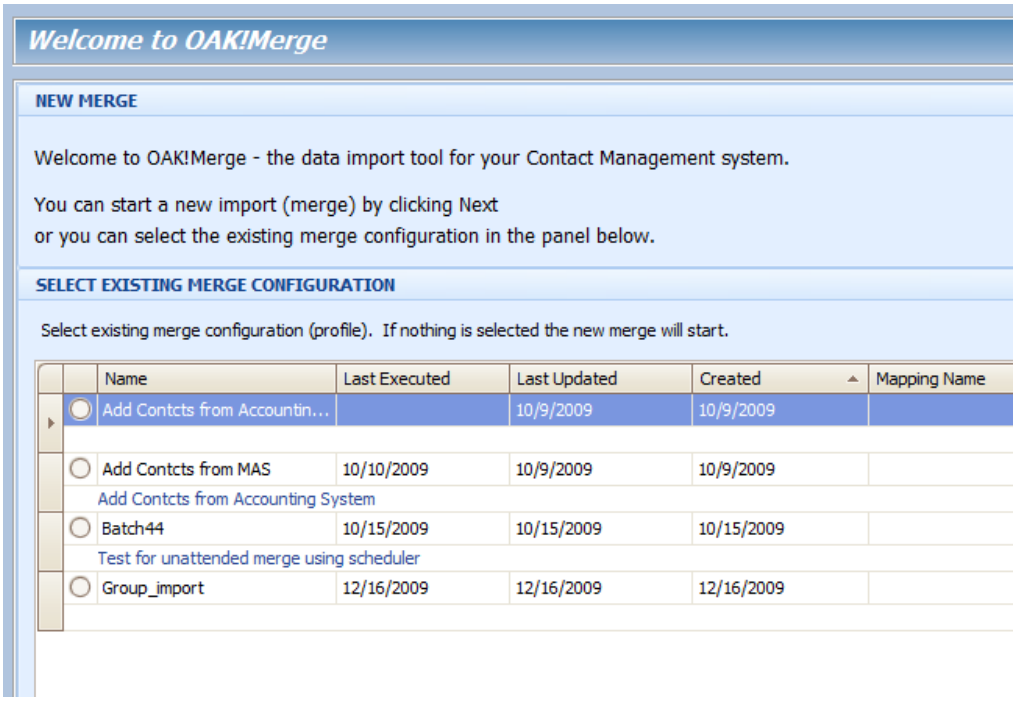
Optional: Save Mapping and Profile information

Profile Information Specifies the full pathname for the import file and target database for this merge, plus the user name and password, if specified. Click the SAVE button to name the profile. After you save a profile, it will display when you start **OAK!Merge**. Save and using Profiles requires the Standard version or higher.

Mappings Information Specifies the full pathname for saving the mappings for this merge.

Note: Basic and Standard versions do not support Profiles, but do allow saving the mappings.

Saved profiles can also be used to run a merge from a scheduler or clickable link/batch file. The Advanced version is required for the unattended merges feature. Profiles are listed on the first screen when OAK!Merge starts. Saved profiles look like this:



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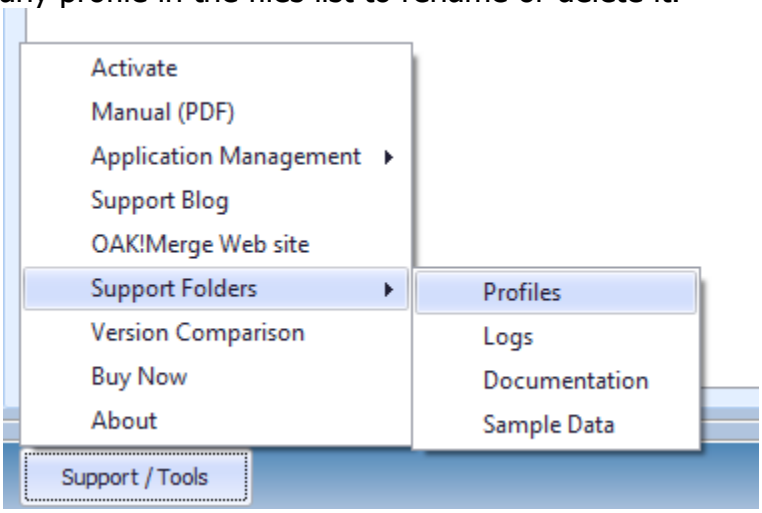
Profiles are stored in the Profiles Folder in the OAK!Merge installation directory. They can be renamed, edited, or deleted there. They are in XML, so editing them in notepad or with an XML editor is for advanced users.

TIP: : an easy way to delete unneeded profiles it to click on Tools/Support button and select Support Folders, then Profiles. You can right mouse click on any profile in the files list to rename or delete it.



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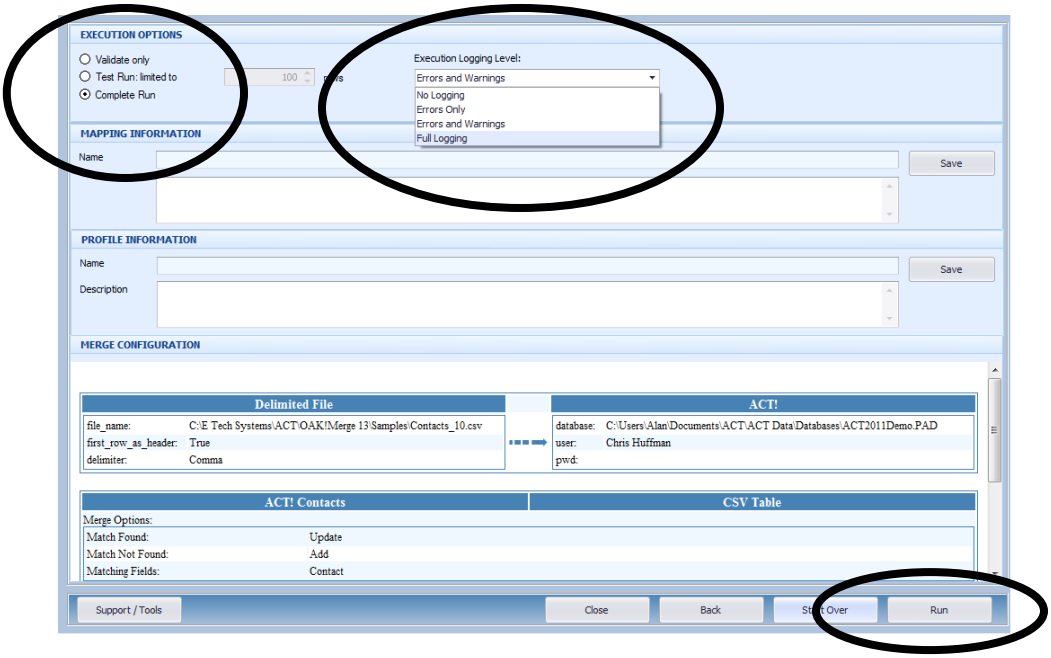
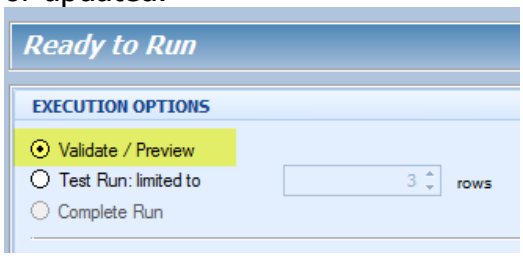
Logging Level is set here. Select Full logging for testing and debugging, but not for normal merges. Full logging slows down the merge and can produces large files.



Click RUN to perform the merge

TIP: When you select Validate / Preview, Act! is NOT updated! It is to preview what will happen if you do a full merge and is useful for error checking the source file to see how many records would be skipped as a dup, deleted, added, or updated.



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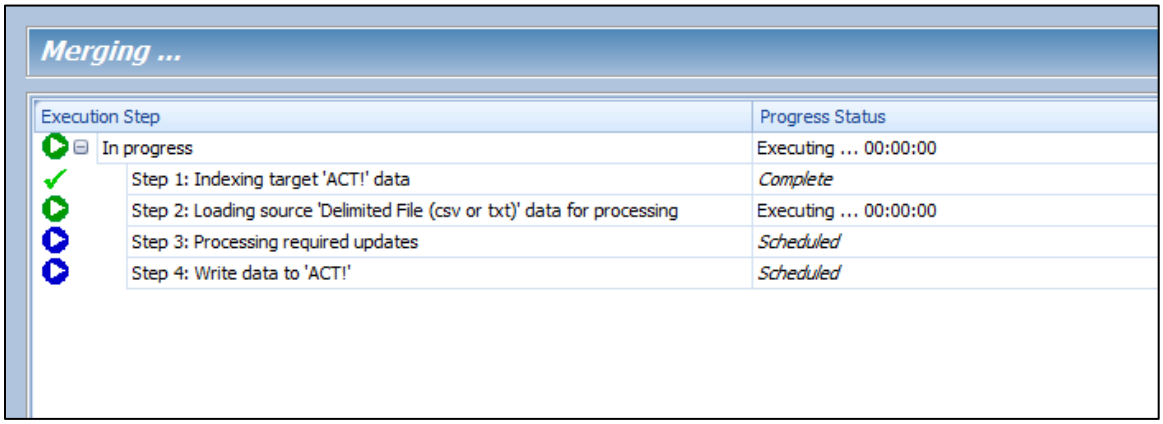
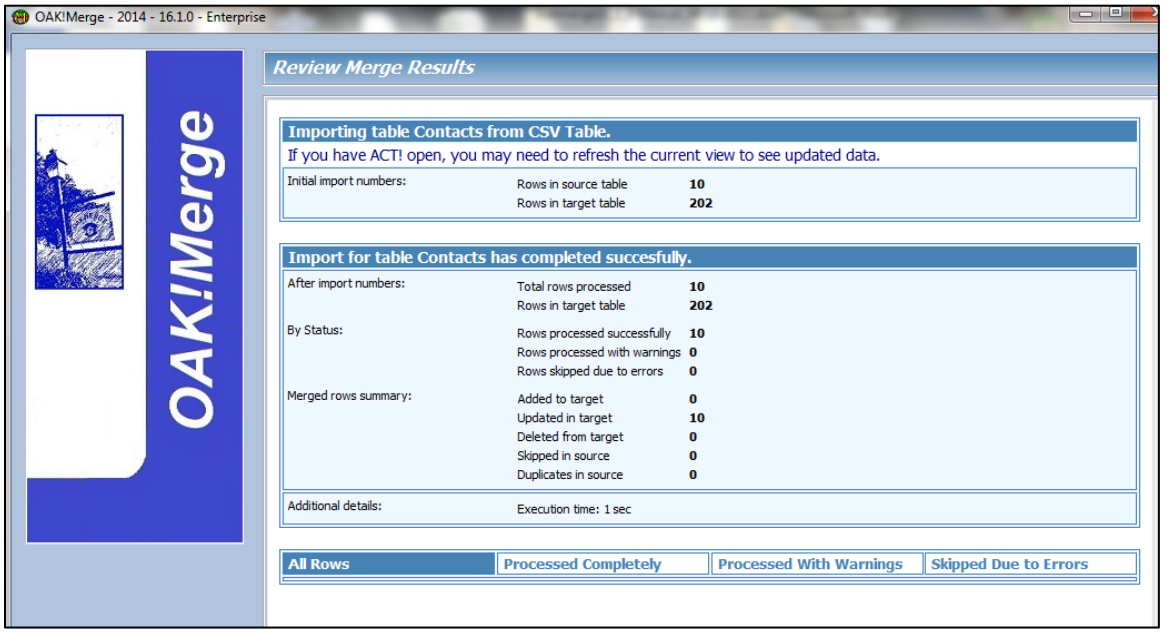
Progress bars and timers show the progress of the merge.



The Results appear next.


OAK!Merge - 2014 - 16.1.0 - Enterprise
OAK!Merge
Review Merge Results
Importing table Contacts from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.
Initial import numbers:
Rows in source table 10
Rows in target table 202
Import for table Contacts has completed succesfully.
After import numbers:
Total rows processed 10
Rows in target table 202
By Status:
Rows processed successfully 10
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added to target 0
Updated in target 10
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec
All Rows
Processed Completely
Processed With Warnings
Skipped Due to Errors

Information in the Tabs at the bottom of the screen is controlled by the logging level set on the Ready to Run page. Select Full Logging for the most info.

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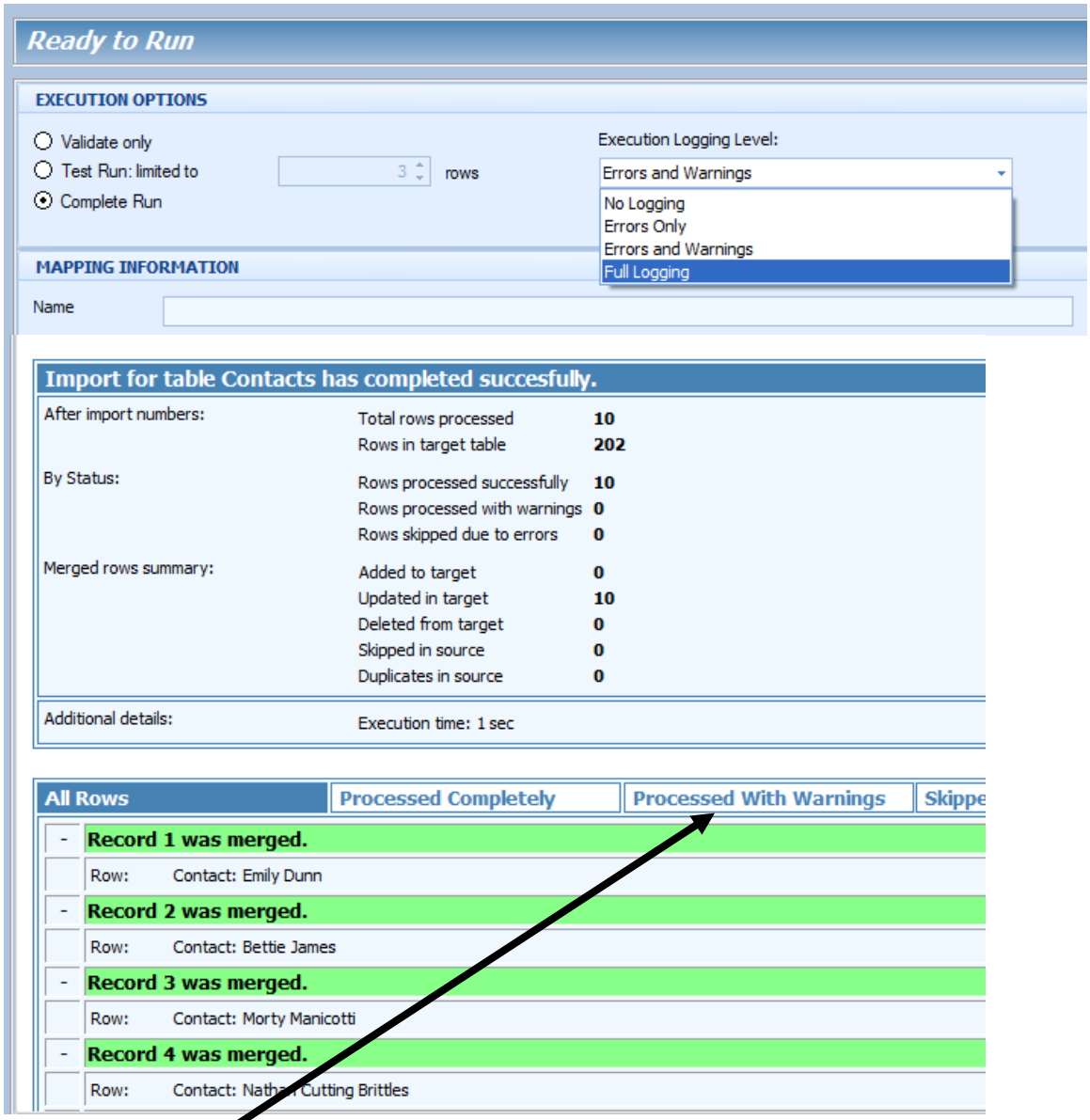

The tabs on the results screen give different views. The +/- on the left will expand/collapse the rows. They are all expanded by default to allow quick visual scans.

TIP: use a CRTL-F to FIND info you need in a long list, such as Skipped.

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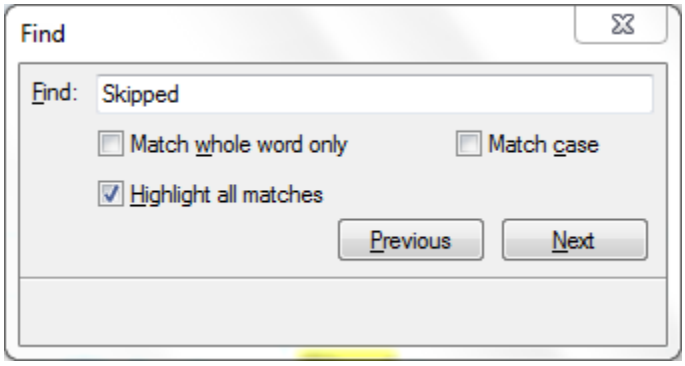

Next, Next, Next… walks you through the list.

Start Over clears all the settings and starts a new merge.

Another run will go back one screen to the Ready to Run screen. You can then use the "Merge rules" button to adjust the current mappings.

Finish will exit the program.

TIP: When checking ACT for changes, you may need to VIEW, REFRESH (or F5) to refresh the information displayed by Act! in order to see the updated information.

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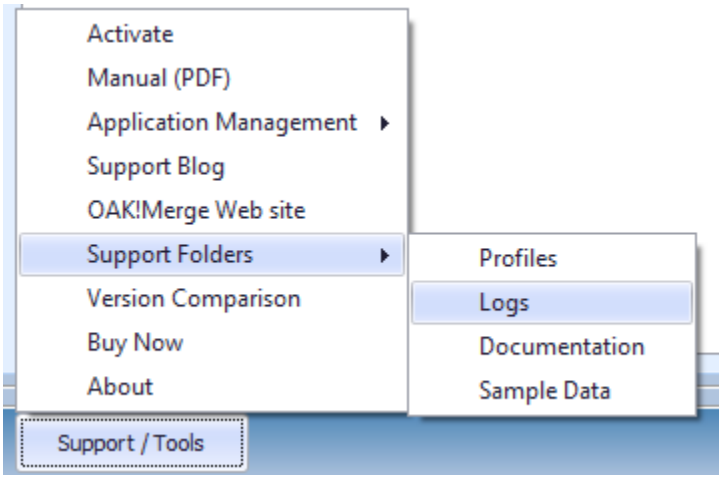
Information from each merge is stored in the logs folder. The information in the results page is stored in a file ending in .htm and can be reviewed later. See the logs file info in Appendix 1 for how to find records skipped, added, deleted, or merged



You can double click on them to see the results page of previous merges.

More information is in Appendix 1 on Logs.

There are also the detailed logs ending in XML that have the details of the merge. You can open and review them to see details of a merge operation.

Tip: You can open the XML log with Excel to see which rows were Added, Merged, or Skipped. Look in column M or Subject.

	Level	LevelNumeri	LevelClass	Category	Subject	Details
19	Information	11	Information	Merge Execution	Record 18 was merged.	##########
20	Information	11	Information	Merge Execution	Record 19 was merged.	##########
21	Information	11	Information	Merge Execution	Record 20 was merged.	##########
22	Information	11	Information	Merge Execution	Record 21 was added.	##########
23	Information	11	Information	Merge Execution	Record 22 was added.	##########
24	Information	11	Information	Merge Execution	Record 23 was added.	##########
25	Information	11	Information	Merge Execution	Record 24 was added.	##########

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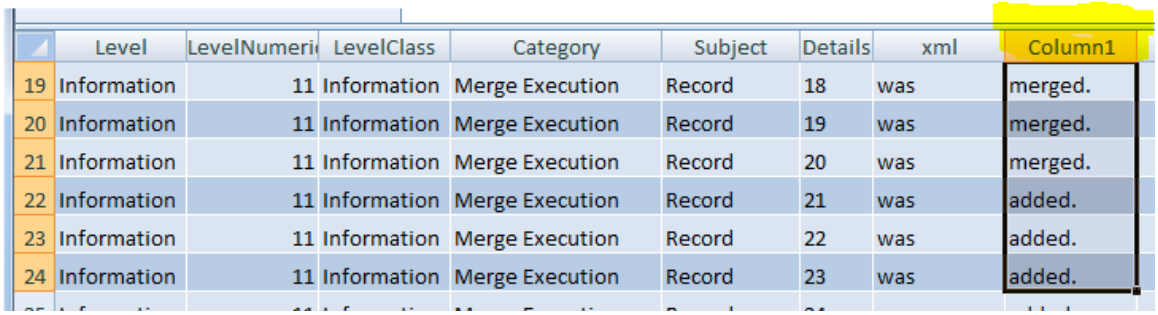

	Level	LevelNumeri	LevelClass	Category	Subject	Details	xml	Column1
19	Information	11	Information	Merge Execution	Record	18	was	merged.
20	Information	11	Information	Merge Execution	Record	19	was	merged.
21	Information	11	Information	Merge Execution	Record	20	was	merged.
22	Information	11	Information	Merge Execution	Record	21	was	added.
23	Information	11	Information	Merge Execution	Record	22	was	added.
24	Information	11	Information	Merge Execution	Record	23	was	added.

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Section 3: Examples of Other Merges

Example 2: Merge to History

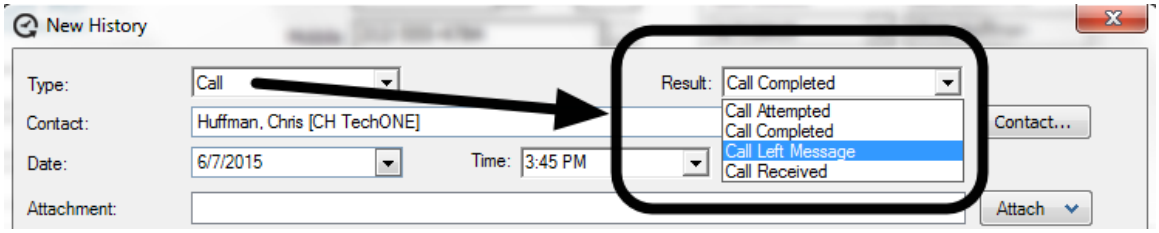
You can ADD or DELETE info to the History tab in Act! You cannot UPDATE it. You ADD the history and link it other objects: Contacts, Companies, Opportunities, or Groups. See the index for the example for Deleting History or Notes

Use the History files in the Samples folder to try these merges with the Act! demo database

There is an important difference in History for a TYPE and a RESULT. The TYPE used as a filter in ACT to limit the choices; but only the RESULT is stored in the database. So the Result of "Call Completed" is stored, not the TYPE of "Call"

You schedule an activity by picking a TYPE, but to get it into history, you must select a RESULT

KEY POINT: When Adding History you have to specify the RESULTS, not a TYPE



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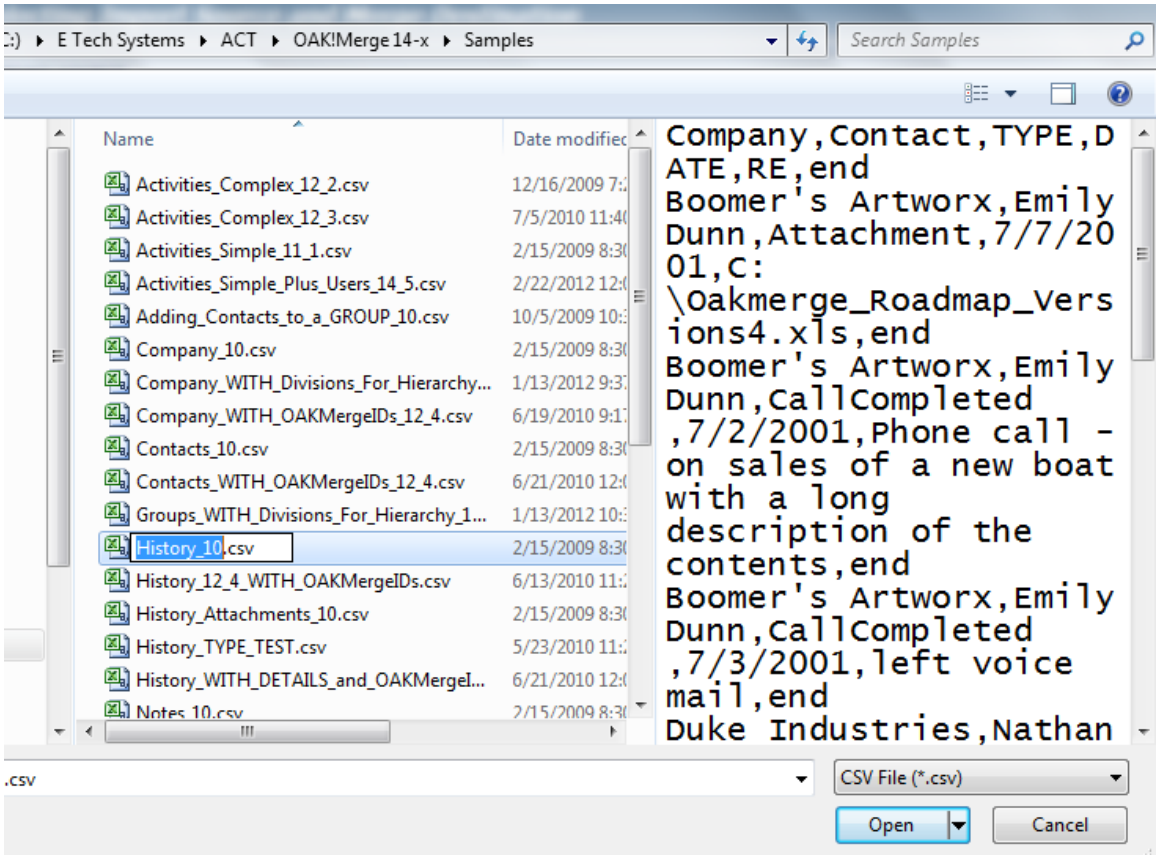
OAK!Merge User's Guide

Version 18.1.1 Revised December 8, 2015



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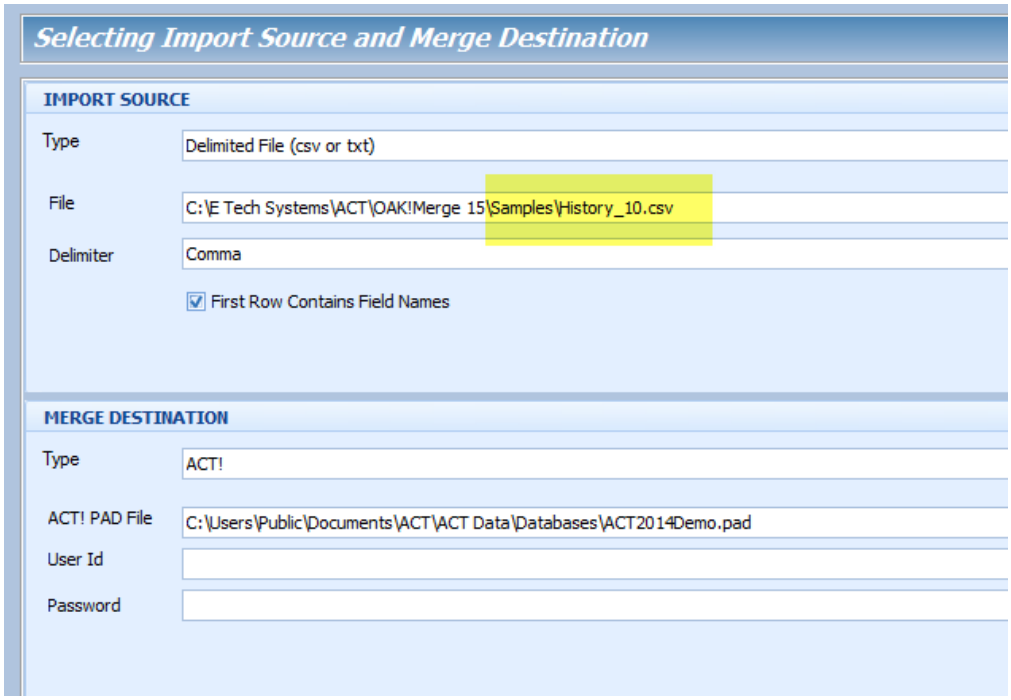
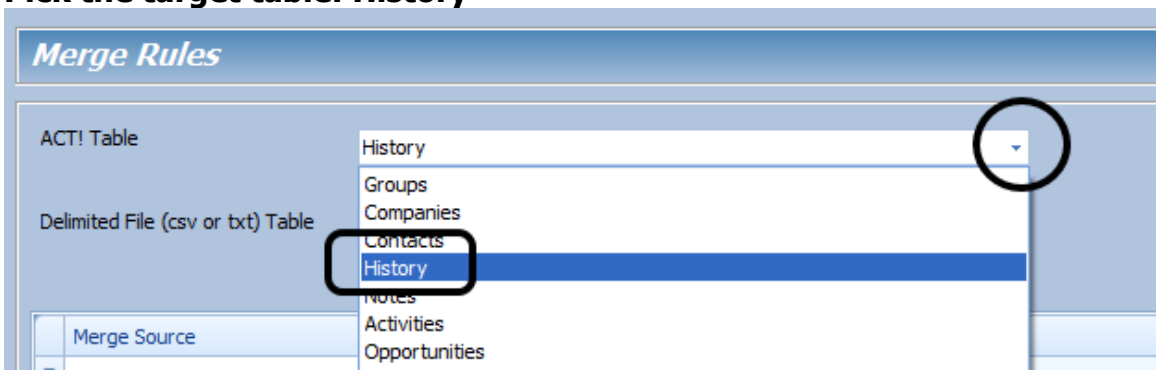


Pick the target table: History



MAP at least: Type, Start Time (this is the date or date/time) , and Regarding fields; then LINK to the Contact and/or Company and/or Opportunity.

TIP: You do <u>not</u> need to link to BOTH the contact and company. Contact histories rollup to the company automatically when viewed in Act!

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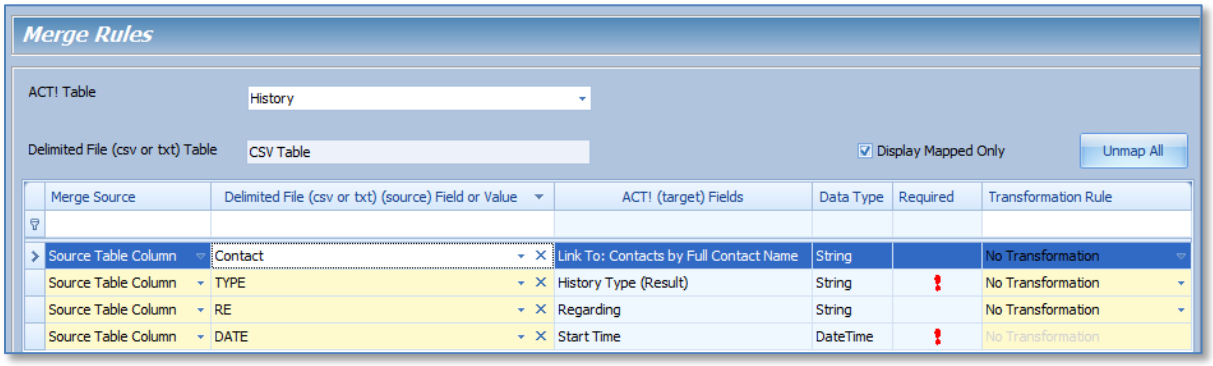
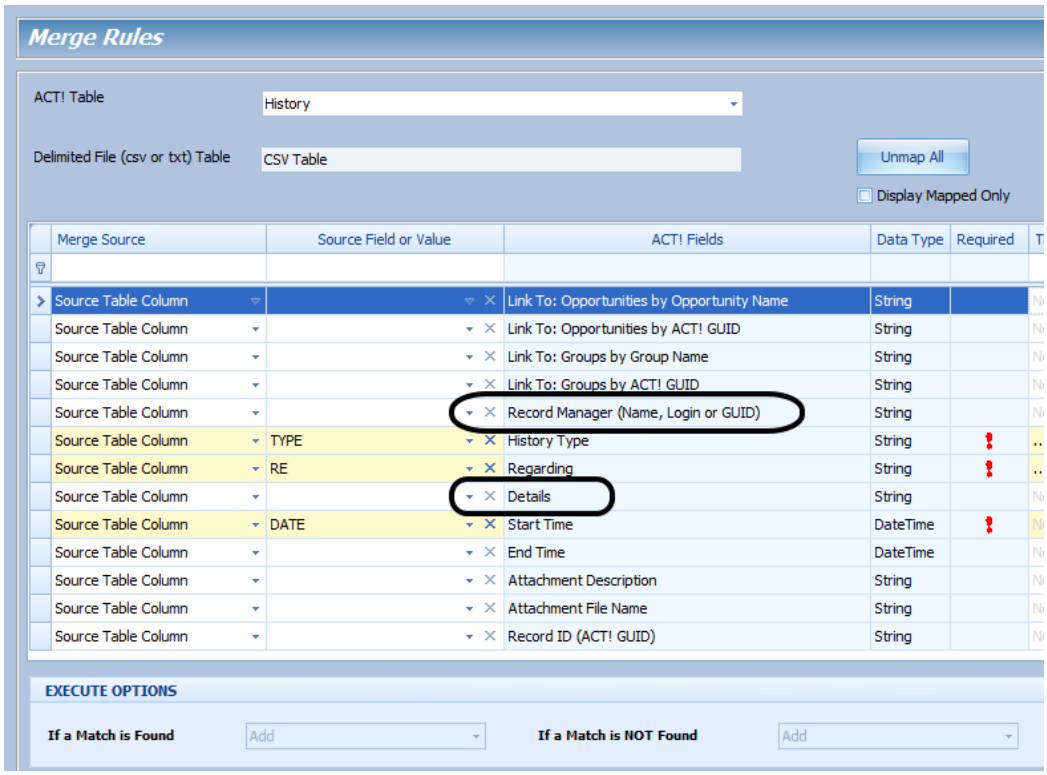


TIP: Use the X after Source Field in the mapping to remove any auto mapped fields that are not needed.

Other optional fields include setting the record manager for the history or adding note info into the details field.



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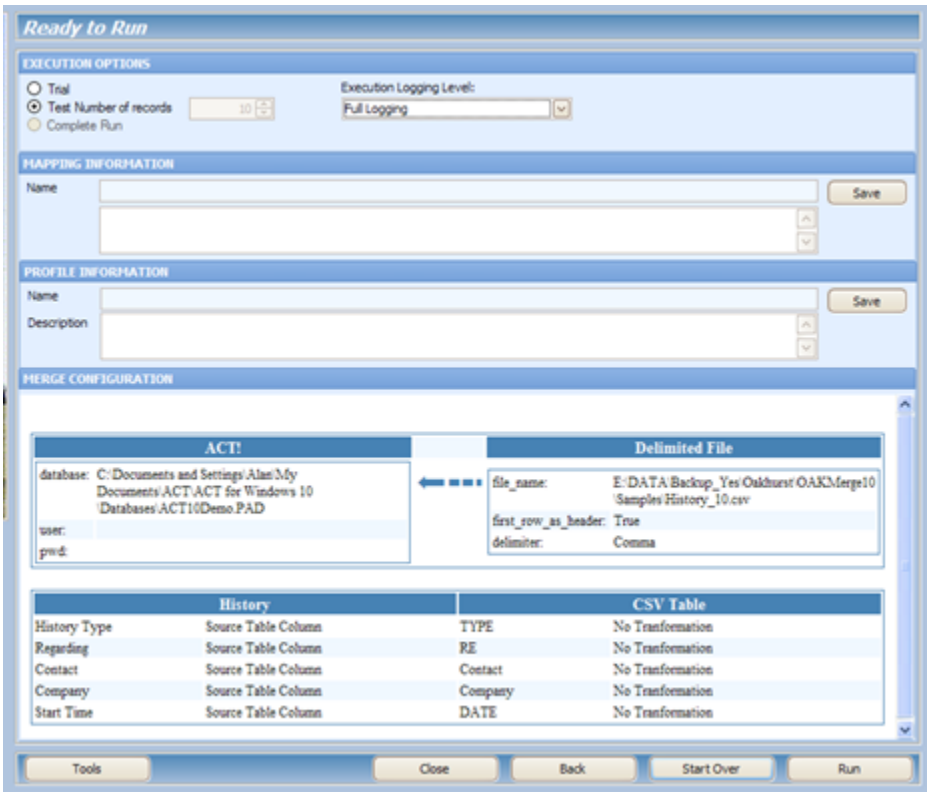
Note that there is no "Matching Fields" column. History is an append only table. (so is Notes and Activities). The Update/Skip execute options at the bottom of the mapping screen are grayed out (inactive).

Pick the Execute option and run it.



You must use the standard words for history types. Use the Results codes.

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Most history types that are not supported by **Act!** in a merge will come in as a TO_Do Done. There are few ACT rejects and will skip that row. See the next list for a few know ones that do not import.

Know good Result Types for History

Access
Access Changed
Activity Deleted
Activity Updated
Appointment Completed
Appointment Erased
Appointment Not Completed
Attachment
Call Attempted
Call Completed
Call Left Message
Call Received
Contact Deleted
Contact Linked
Contact Unlinked
Contact Updated
Data Moved
E-mail Attachment
E-mail Auto Attached
E-mail Not Sent
E-mail Sent
Error
Fax Not Sent
Fax Sent
Field Changed
Letter Sent
Marketing Call Completed
Marketing Call Not Completed
Meeting Held
Meeting Not Held
New Opportunity
Opportunity Inactive
Opportunity Lost
Opportunity Opened
Opportunity Stage Update
Opportunity Won
Personal Activity Cancelled
Personal Activity Completed
Personal Activity Not Completed
Personal Activity Postponed
Quote
Received Sync
Replace Fields Log
Sent Sync
Timer
To-do Done
To-do Not Done
Vacation Cancelled
Vacation Completed
Vacation Not Completed
Library Document*

***Library Document results require a File Path**

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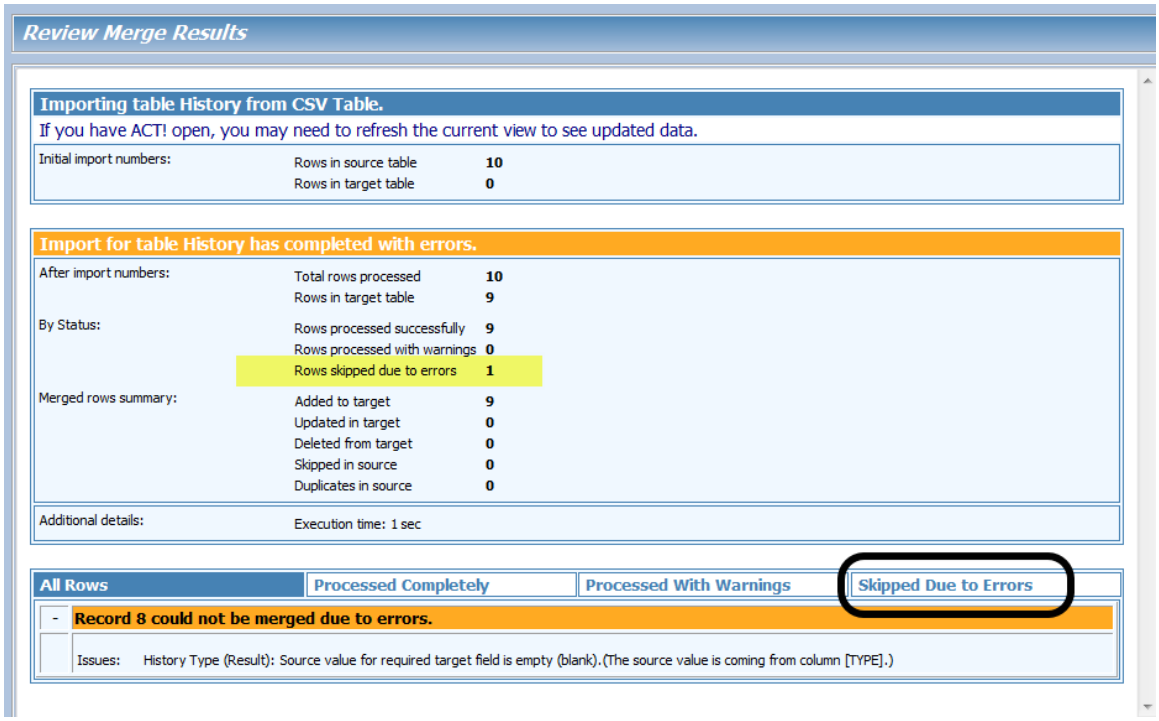
History Types/Results Know not to work "as-is" are listed below. They will be converted to a type of "To-Done" and added

Call
Meeting
Todo
Call Erased
Meeting Erased
Personal Activity Erased
Vacation Erased
To-do Erased
Erased
Library Document Attached

Any other unknown Type/Result code is converted to a "To-Do Done"

The sample file History_10.csv used above has 1 error to demonstrate errors. Click on the errors tab to see it. The regarding field cannot be blank. See the tip below on how to fill it in, during an import.


Review Merge Results
Importing table History from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.
Initial import numbers:
Rows in source table 10
Rows in target table 0
Import for table History has completed with errors.
After import numbers:
Total rows processed 10
Rows in target table 9
By Status:
Rows processed successfully 9
Rows processed with warnings 0
Rows skipped due to errors 1
Merged rows summary:
Added to target 9
Updated in target 0
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec
All Rows
Processed Completely
Processed With Warnings
Skipped Due to Errors
Record 8 could not be merged due to errors.
Issues: History Type (Result): Source value for required target field is empty (blank).(The source value is coming from column [TYPE].)

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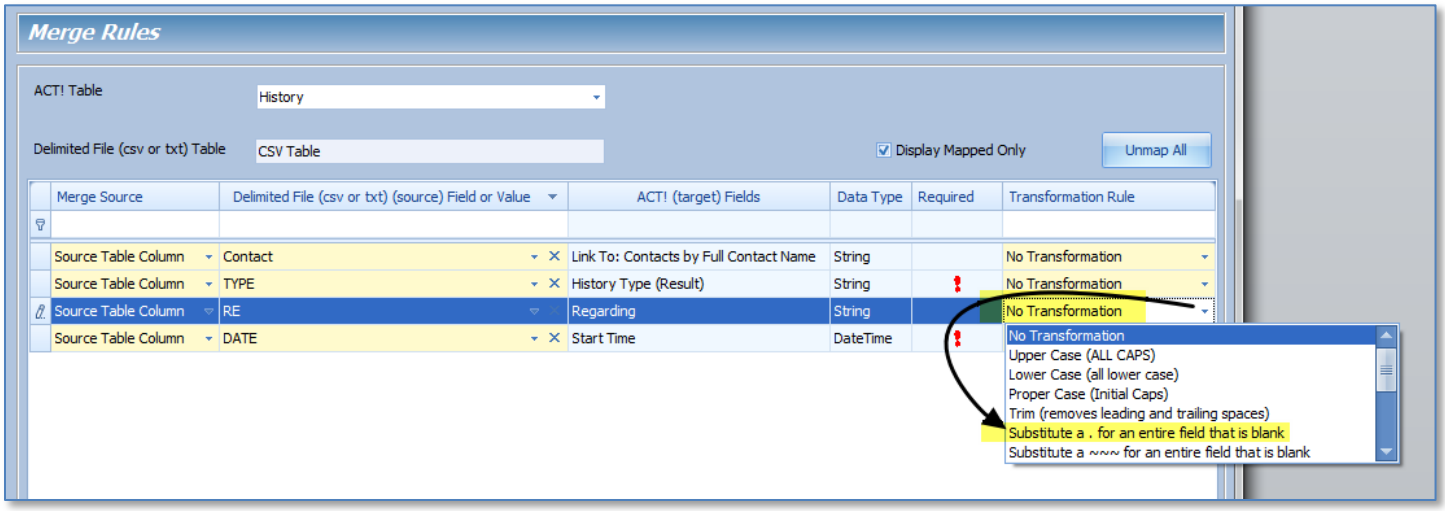
TIP: If you have blanks in some regarding fields, you can add a character such as a period in the source file before you import it; OR use a transformation (Substitute a . for an entire field that is blank) to substitute a "." for any blank regarding fields.



Another example.

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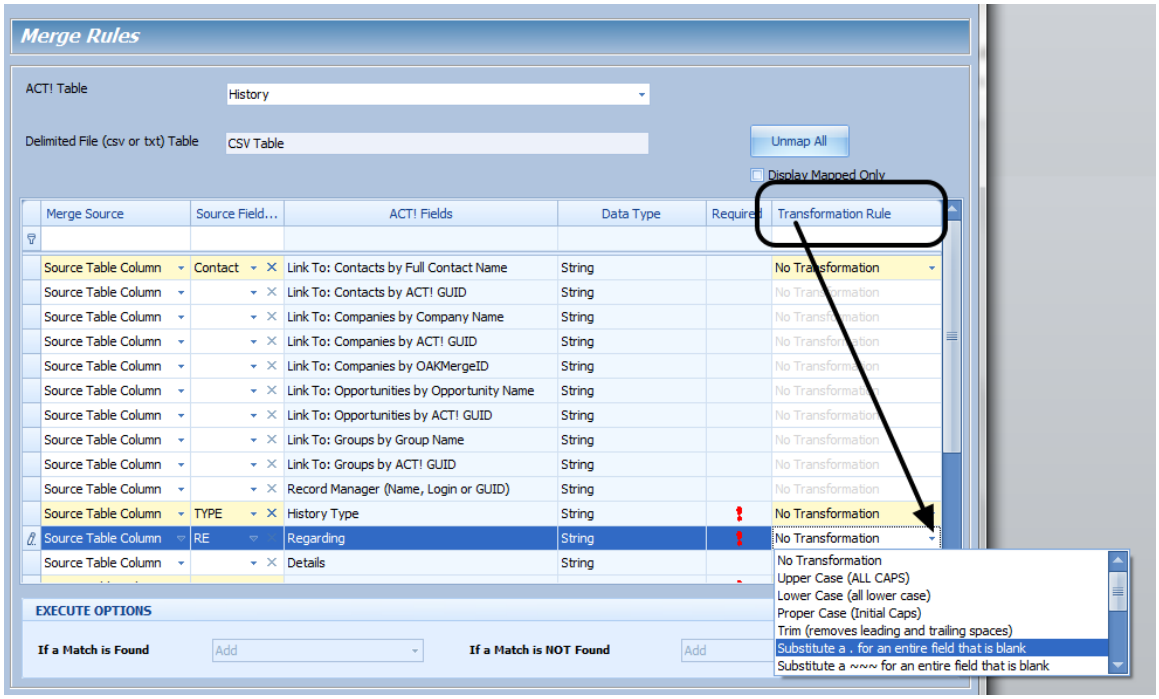

TIP: When linking History, Notes, or Activities; you link them to the CONTACT; you do not need to link them to the company too. If you view a company in ACT where the contacts have been linked to the company; you will see a rollup of the contact history.

Linking history to Companies is only needed if you want the history at the company level only.

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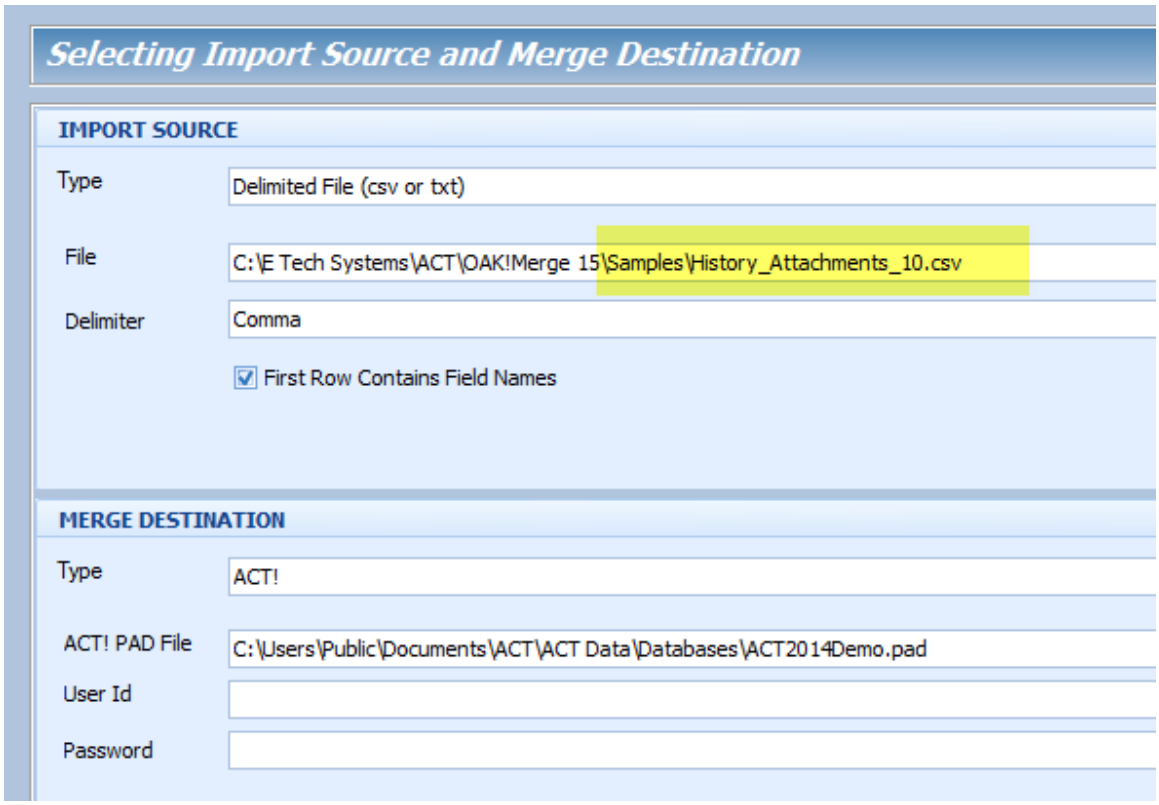
Example 3: Merging Attachments into History Tab or Documents Tab

Merging history with files attached is slightly different mapping for history. Review the sample file.



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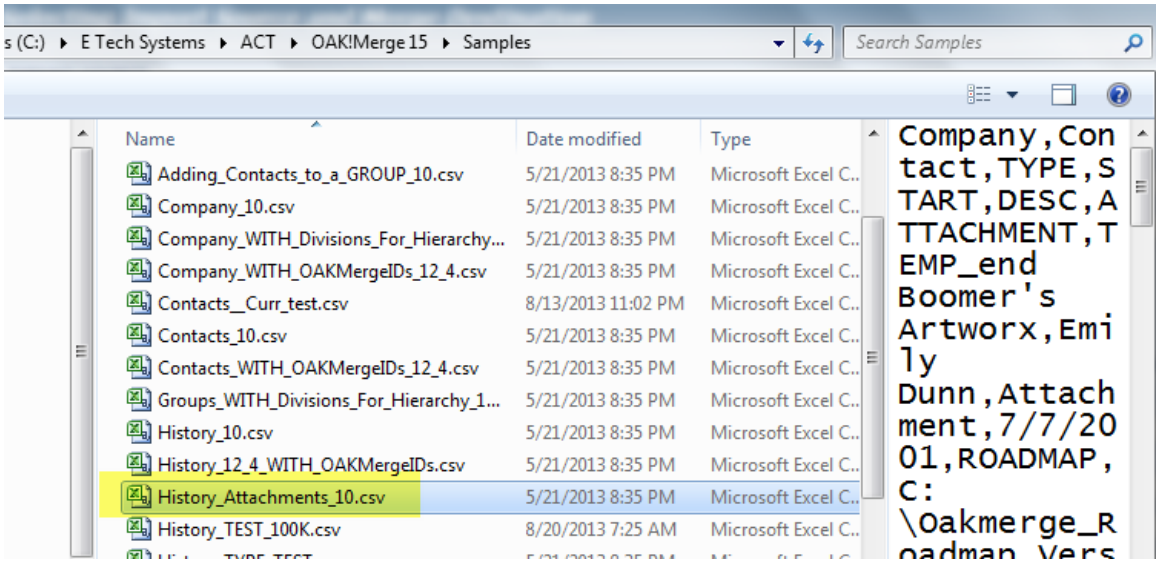
s (C:) ▸ E Tech Systems ▸ ACT ▸ OAK!Merge 15 ▸ Samples
Search Samples
Name
Date modified
Type
Adding_Contacts_to_a_GROUP_10.csv 5/21/2013 8:35 PM Microsoft Excel C..
Company_10.csv 5/21/2013 8:35 PM Microsoft Excel C..
Company_WITH_Divisions_For_Hierarchy... 5/21/2013 8:35 PM Microsoft Excel C..
Company_WITH_OAKMergeIDs_12_4.csv 5/21/2013 8:35 PM Microsoft Excel C..
Contacts__Curr_test.csv 8/13/2013 11:02 PM Microsoft Excel C..
Contacts_10.csv 5/21/2013 8:35 PM Microsoft Excel C..
Contacts_WITH_OAKMergeIDs_12_4.csv 5/21/2013 8:35 PM Microsoft Excel C..
Groups_WITH_Divisions_For_Hierarchy_1... 5/21/2013 8:35 PM Microsoft Excel C..
History_10.csv 5/21/2013 8:35 PM Microsoft Excel C..
History_12_4_WITH_OAKMergeIDs.csv 5/21/2013 8:35 PM Microsoft Excel C..
History_Attachments_10.csv 5/21/2013 8:35 PM Microsoft Excel C..
History_TEST_100K.csv 8/20/2013 7:25 AM Microsoft Excel C..
Company,Contact,TYPE,START,DESC,ATTACHMENT,TEMP_end
Boomer's Artworx,Emily Dunn,Attachment,7/7/2001,ROADMAP,C:\oakmerge_R

Company	Contact	TYPE	STARTDATE	DESC		ATTACHMENT
Boomer's Artworx	Emily Dunn	Attachment	7/7/2001	ROADMAP TEST		C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Boomer's Artworx	Emily Dunn	Attachment	7/2/2001	Attachment		C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Boomer's Artworx	Emily Dunn	Attachment	7/3/2001	TEST		C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Duke Industries	Nathan Cutting Brittles	Attachment	7/4/2001	Attachment TEST	5	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Duke Industries	Nathan Cutting Brittles	Attachment	7/5/2001	Attachment TEST	6	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Duke Industries	Nathan Cutting Brittles	Attachment	7/6/2001	Attachment TEST	7	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Duke Industries	Nathan Cutting Brittles	Attachment	7/7/2001	Attachment TEST	8	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Jake Flakes Inc.	Bella Minoal	Attachment	7/8/2001	Attachment TEST	9	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Mad House;The	Greg Hart	Attachment	7/9/2001	Attachment TEST	10	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_
Yellow Jersey Bikes	Ashley Allan	Attachment	7/10/2001	Attachment	11	C:\Program Files\OakHurst\OakMe Act!\Documents\Samples\History_

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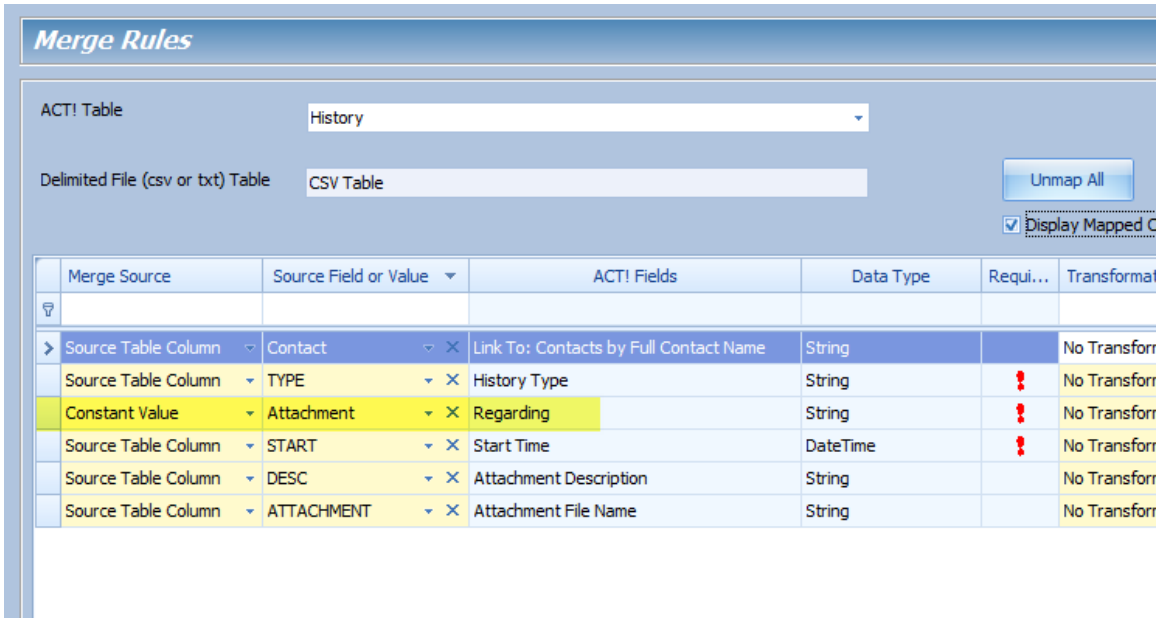

Note that the Regarding has been set to "Attachment" as a constant variable. It could have been in the import table. Regarding is required, so it has to be in the import file with data or set via a Constant Value or use the transformation to add a period "." if it is blank

The history is linked to the contact by Full Name. The "Link to Contact using OAKMergeID" would be available here only if a custom field called OAKMergeID exist in the Contact. You cannot use BOTH "Link to the Contact by Full Name" AND "Link to Contact using OAKMergeID
Ready to Run Screen

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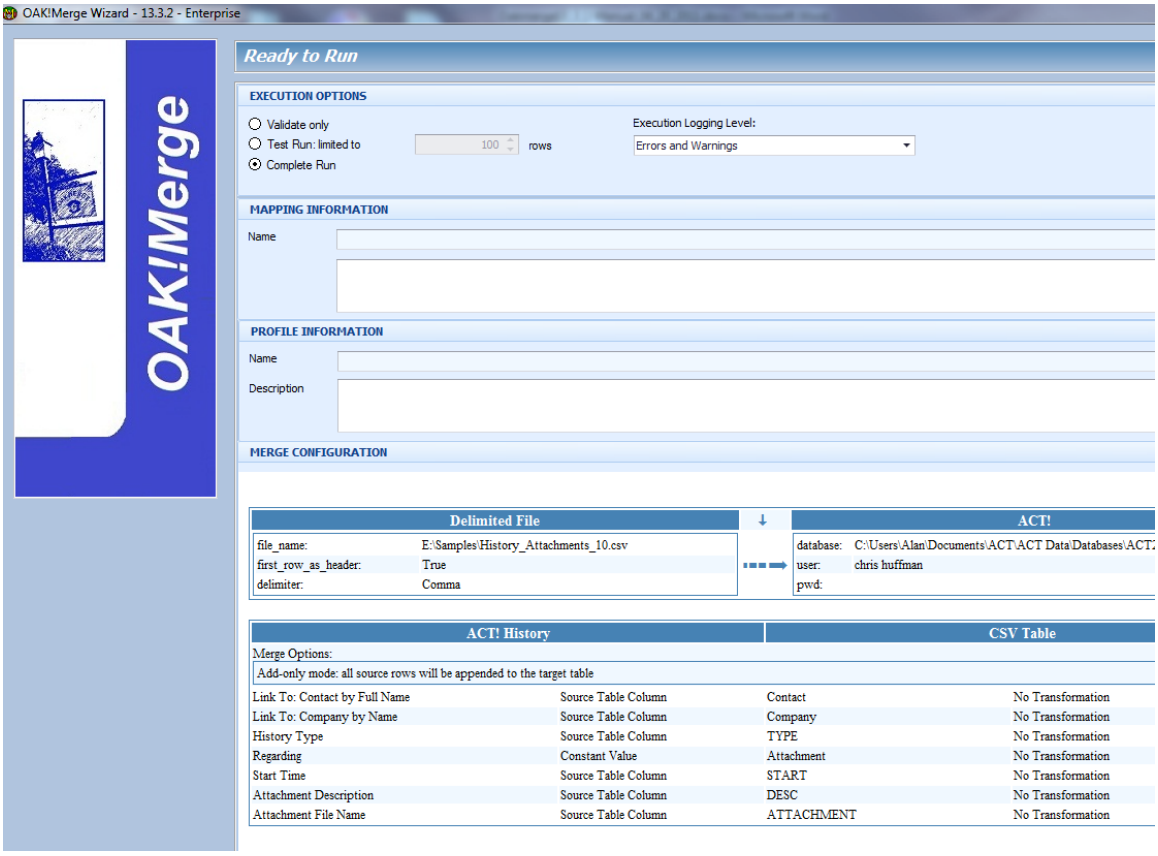
OAK!Merge User's Guide

Version 18.1.1 Revised December 8, 2015



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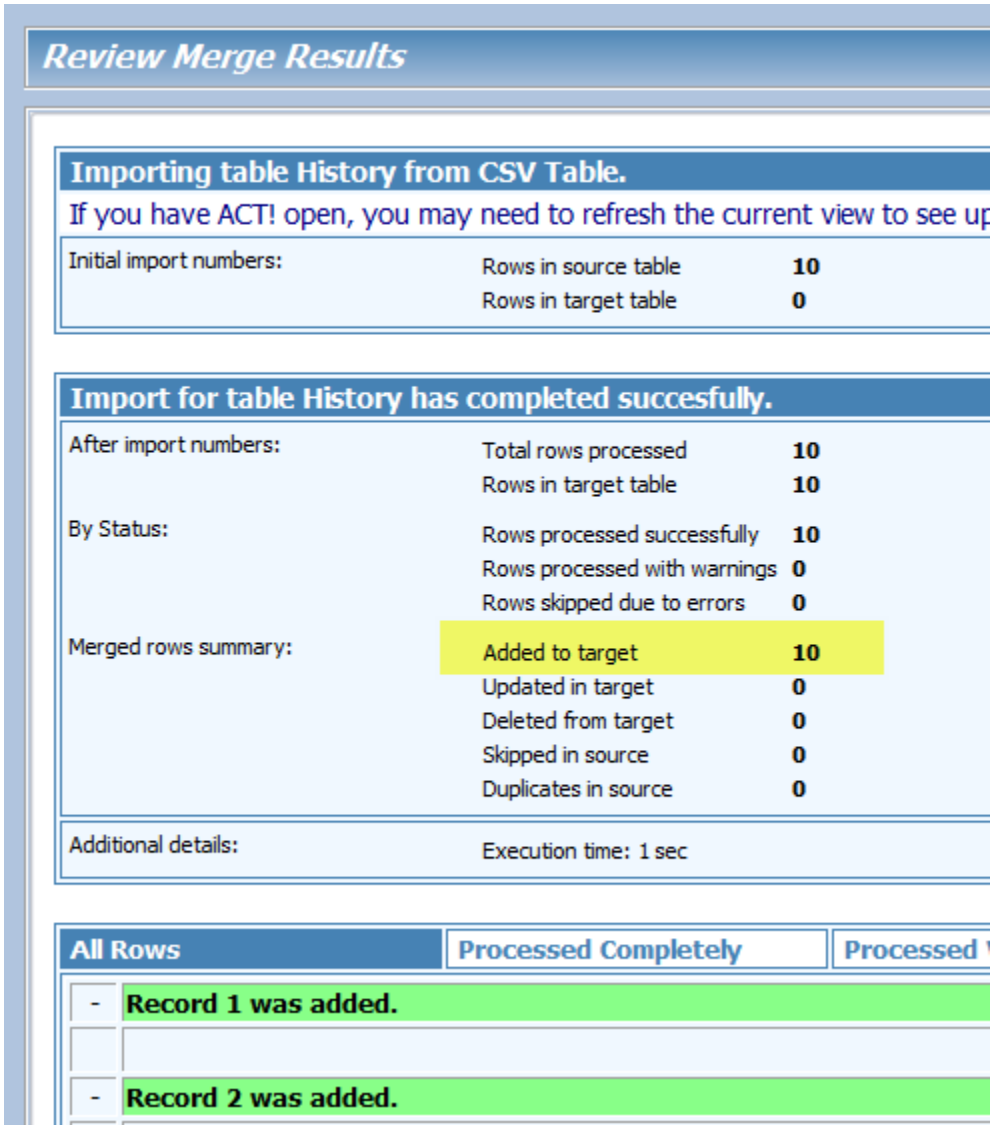
Results


Review Merge Results
Importing table History from CSV Table.
If you have ACT! open, you may need to refresh the current view to see up
Initial import numbers:
Rows in source table 10
Rows in target table 0
Import for table History has completed succesfully.
After import numbers:
Total rows processed 10
Rows in target table 10
By Status:
Rows processed successfully 10
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added to target 10
Updated in target 0
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec
All Rows
Processed Completely
Record 1 was added.
Record 2 was added.

Documents TAB imports are only slightly different than to the History Tab. They both are to the History table/ .
To import files to the Documents tab, you must use a Type/Result of "Library Document" and map the "Attachment File Name path " field.

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Example 4: Group Assignment Merge

Contacts may be added as static member of a group. You UPDATE or ADD a contact while setting the LINK to field.

Adding Contacts to groups is shown in the sample file GROUP_10.csv

Sample data looks like:

Company	Contact	**GROUP_NAME**	end
Boomer's Artworx	Emily Dunn	TEST1	end
Boomer's Artworx	Bettie James	TEST1	end
Corleone's Pasta Company	Morty Manicotti	TEST1	end
Duke Industries	Nathan Cutting Brittles	TEST1	end
Duke Industries	Marion Morrison	TEST1	end
Duke Industries	Kirby York	TEST1	end
Duke Industries	Ethan Edwards	TEST1	end
Jake Flakes Inc.	Bella Minoal	TEST1	end
Mad House;The	Greg Hart	TEST2	end
Yellow Jersey Bikes	Ashley Allan	TEST2	end

The Group names must exist and be unique. The sub group parent name is not used and cannot be set. Top level and sub groups are all treated the same. Use the "Link to Groups by Group Name" field

In this example we are using 2 fields to match on (Contact and Company) then updating one field: the link to Group buy Group name field.

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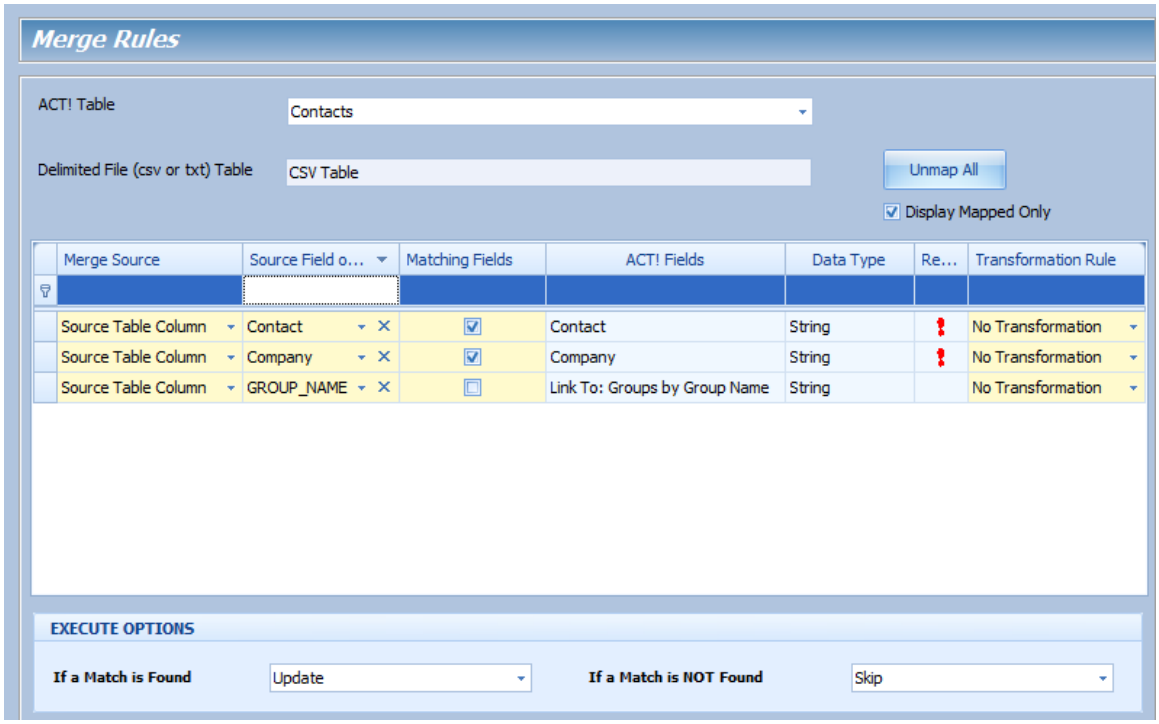

TIP: : If you don't have a group name in a field in the source file, you can use a constant value in the mapping to add all the contacts to the same group. Remember, the group MUST exist in Act! before you can add contacts to it. OAK!Merge can also import Groups (even as subgroups of groups)

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Example: You put the group name in the source file. Each row in a source file will update the group membership for all the contacts that match, but only the first one will be used if there are duplicate rows . in the source file, based on the fields selected for "matching" .

If you are matching on Contact name, this works

CONTACT, GROUP_NAME
Contact A, Group 33
Contact B, Group 7
Contact C, Group 33

Above is adding 3 people to one group each. May be the same or different groups.

Below is One person, trying to add them to 3 groups at once

If you are matching on Contact name, this does **NOT** work

CONTACT, GROUP_NAME
Contact A, Group 33
Contact A, Group 7
Contact A, Group 4

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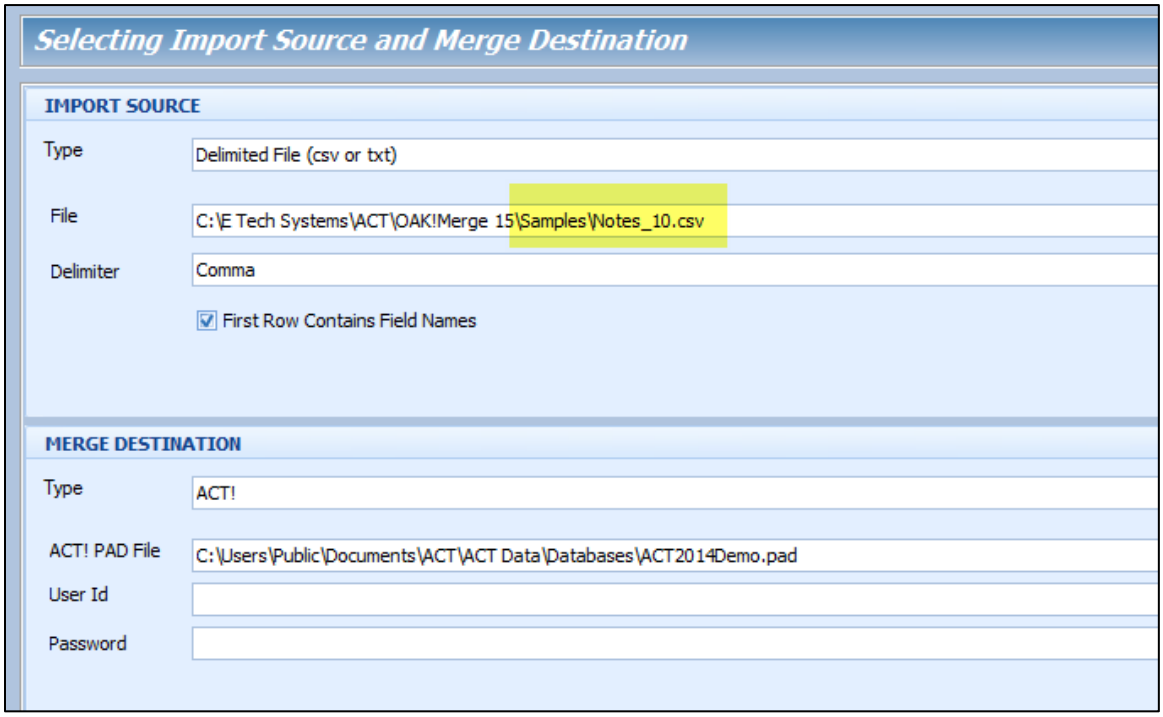
Example 5: Notes Merge

You can ADD Notes and link them to Contacts, Companies, or Opportunites. You can also DELETE Notes. See the index or table of contents for how to Delete notes. You cannot UPDATE existing Notes.



Samples\Notes_10.csv

Company	Contact	Time	Note	Temp_end
Boomer's Artworx	Emily Dunn	7/7/2001	C:\Oakmerge_Roadmap_Versions4.xls	Temp_end
Boomer's Artworx	Emily Dunn	7/2/2001	Phone call - on sales of a new boat with a long description of the contents	Temp_end

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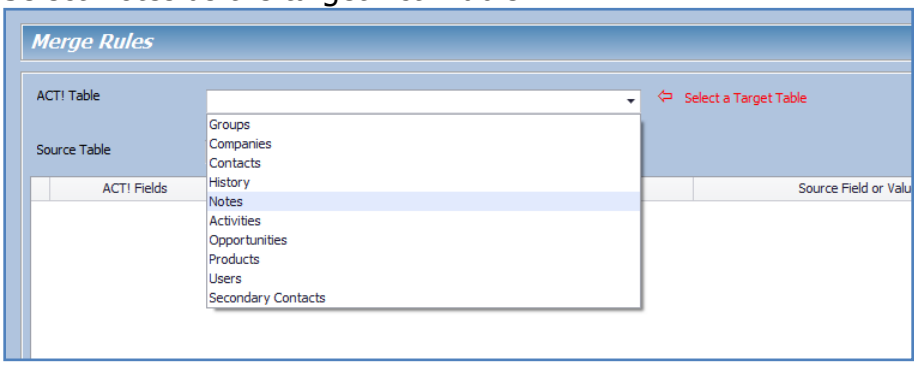
			TEST BIG NOTE as a TABLE Company Contact GROUP_NAME end Boomer's Artworx Emily Dunn TEST1 end Boomer's Artworx Bettie James TEST1 end Corleone's Pasta Company Morty Manicotti TEST1 end Duke Industries Nathan Cutting Brittles TEST1 end Duke Industries Marion Morrison TEST1 end Duke Industries Kirby York TEST1 end Duke Industries Ethan Edwards TEST1 end Jake Flakes Inc. Bella Minoal TEST1 end	
Boomer's Artworx	Emily Dunn	7/3/2001	Mad House;Thekes Ashley Allan TEST2 end	Temp_end
Duke Industries	Nathan Cutting Brittles	7/4/2001	left voice mail	Temp_end

Select Notes as the target Act! Table



Map the Date/Time and Regarding. The Link To: fields connect the notes to contacts, companies, groups, opportunities, or custom tables.

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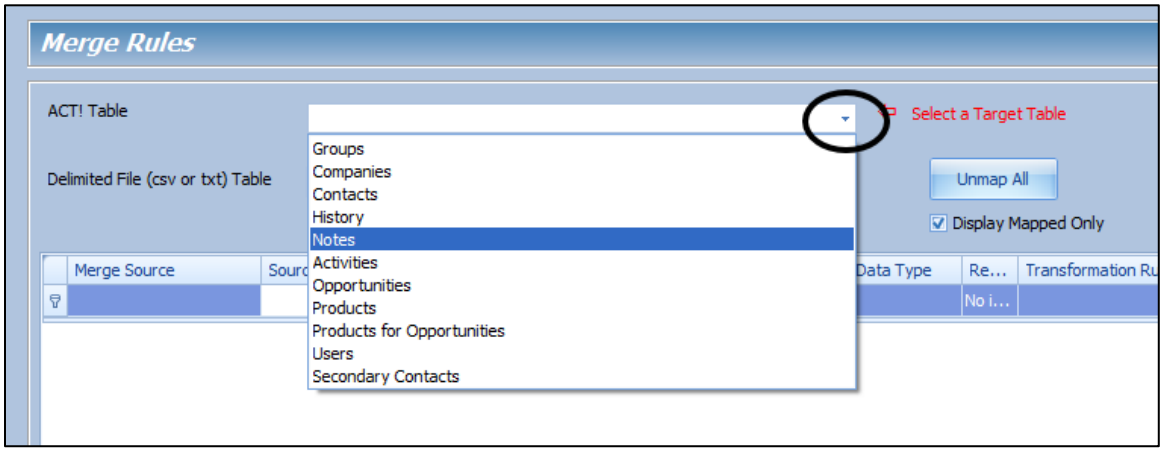
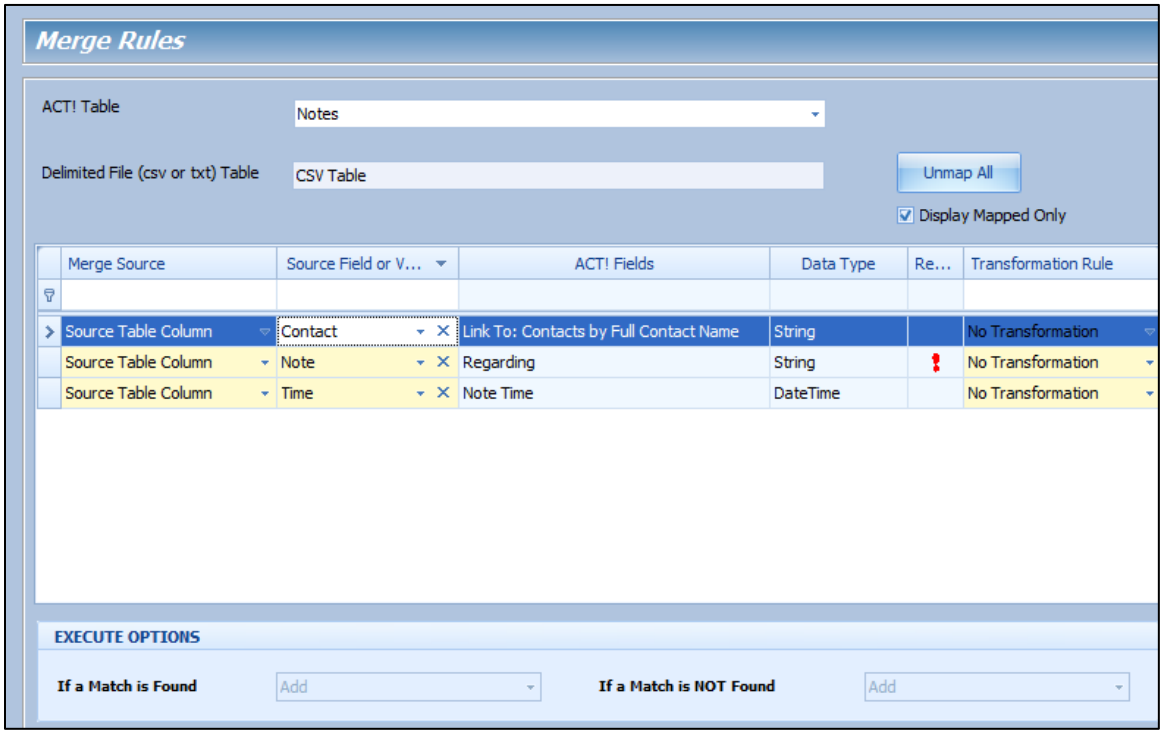


Linking rules: Only the name, GUID, or a custom field called OAKMergeID can be used to LINK notes to top level tables. If a custom field called OAKMergeID exists in the top level table, then the LINK using it will appear as an option in the mapping for that table.

Map the note info to Regarding, and Date or Date/Time to Time.



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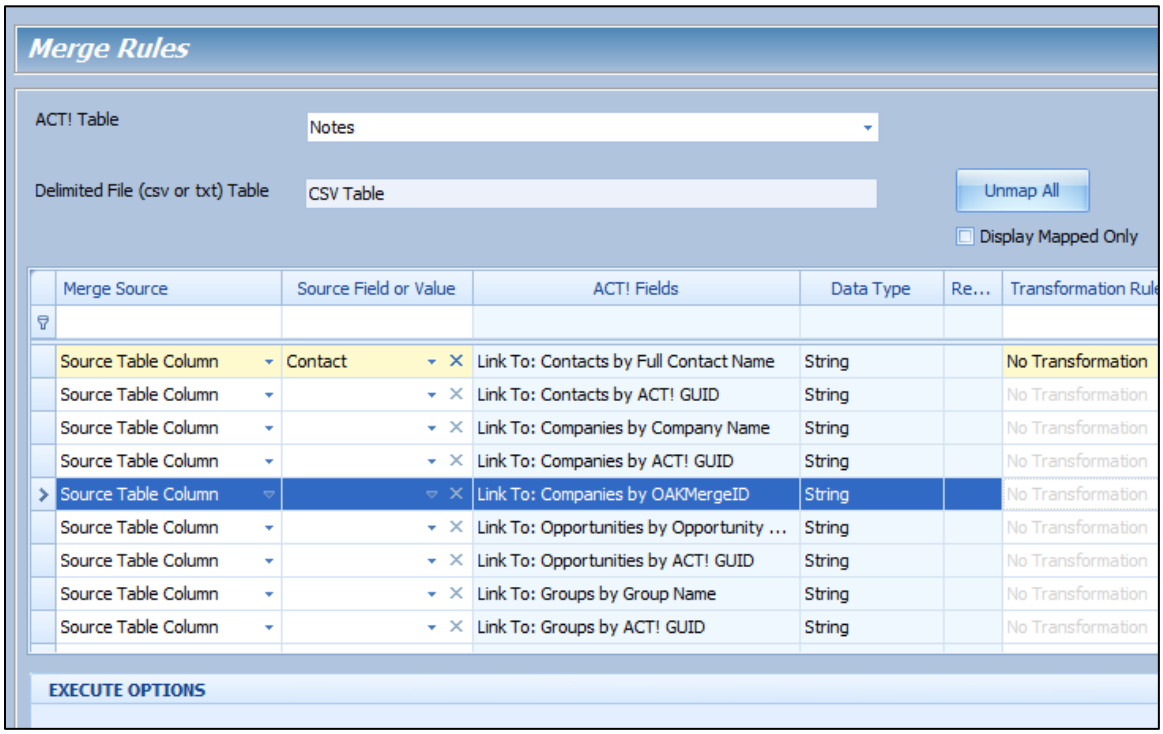
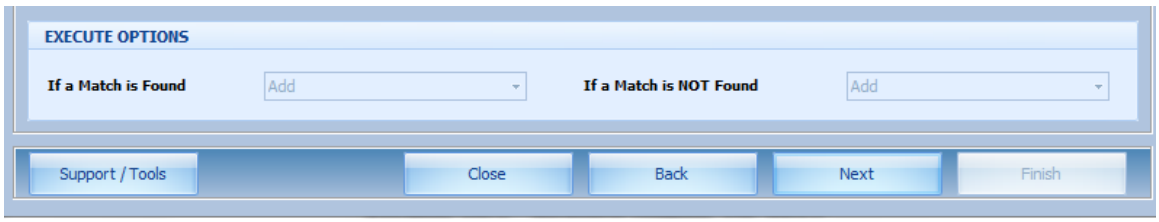
Note a custom field called OAKMergeID was added to this ACTDemo database to the Companies, so it appears as an option for Linking notes to companies. It is not available for linking to Opportunities because the opportunity table in ACT does not have a custom field called OAKMergeID**.**

TIP: If you link Notes to contacts, you do **not** also need to link them to companies. They roll-up anyway as viewable in ACT.



Execute options for Notes, History, and Activities are always grayed out. They are append only. There is no matching to find and update data in these tables.



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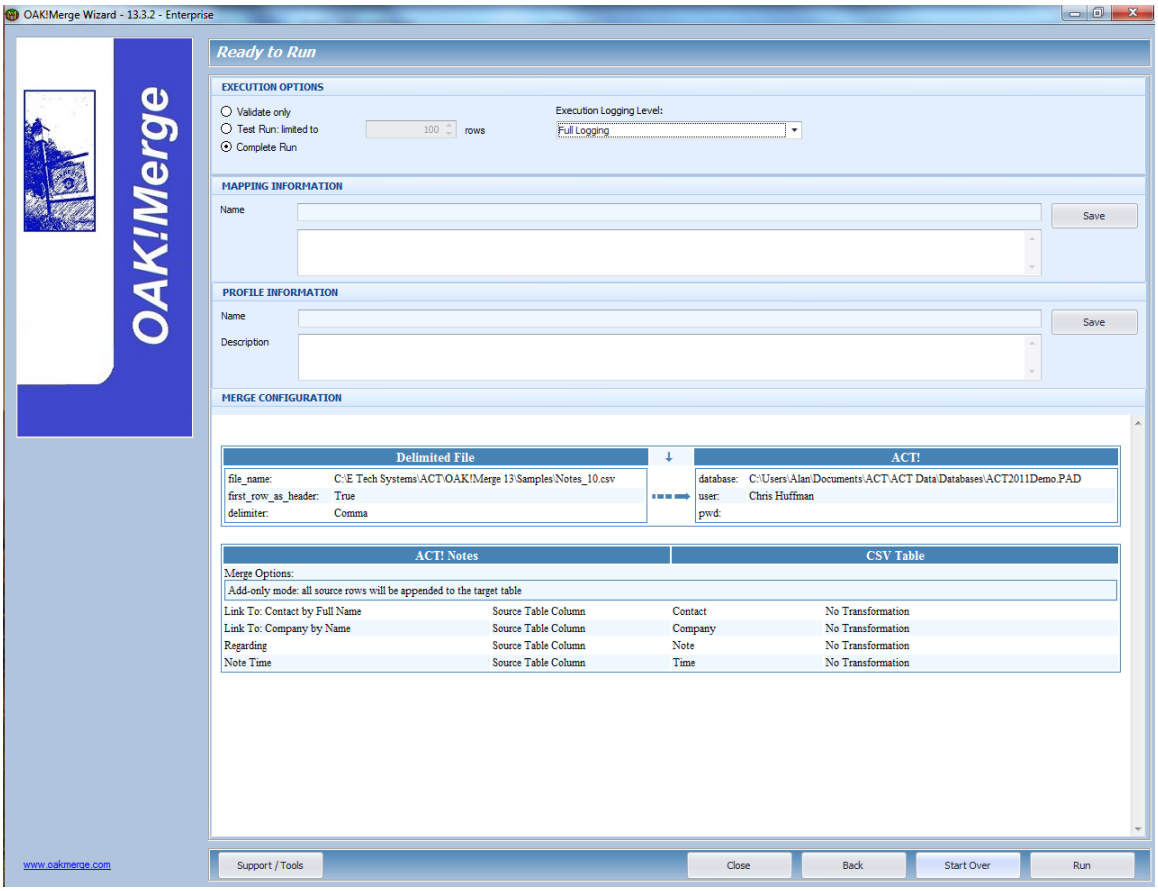
Set execute and logging options, the Run to execute



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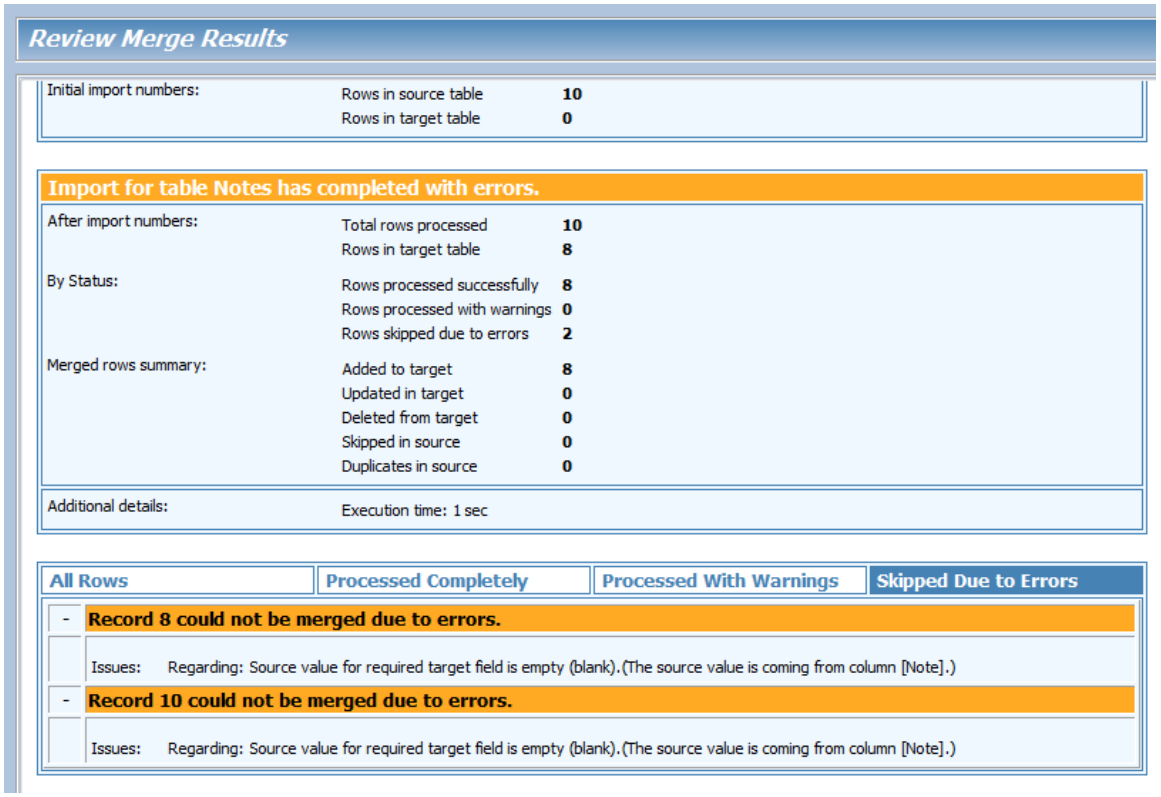
Review Merge Results
Initial import numbers:
Rows in source table 10
Rows in target table 0
Import for table Notes has completed with errors.
After import numbers:
Total rows processed 10
Rows in target table 8
By Status:
Rows processed successfully 8
Rows processed with warnings 0
Rows skipped due to errors 2
Merged rows summary:
Added to target 8
Updated in target 0
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec
All Rows
Processed Completely
Processed With Warnings
Skipped Due to Errors
Record 8 could not be merged due to errors.
Issues: Regarding: Source value for required target field is empty (blank).(The source value is coming from column [Note].)
Record 10 could not be merged due to errors.
Issues: Regarding: Source value for required target field is empty (blank).(The source value is coming from column [Note].)

2 test records were skipped because a required field (Regarding) was blank.

Notes imports require a date and regarding. Any rows that are not properly linked will be added to the "My record" of the ACT user specified in OAK!Merge where the target database was picked. If no record manager is specified in the source file or as constant, they will all be set to the ACT user specified in OAK!Merge where the target database was picked.

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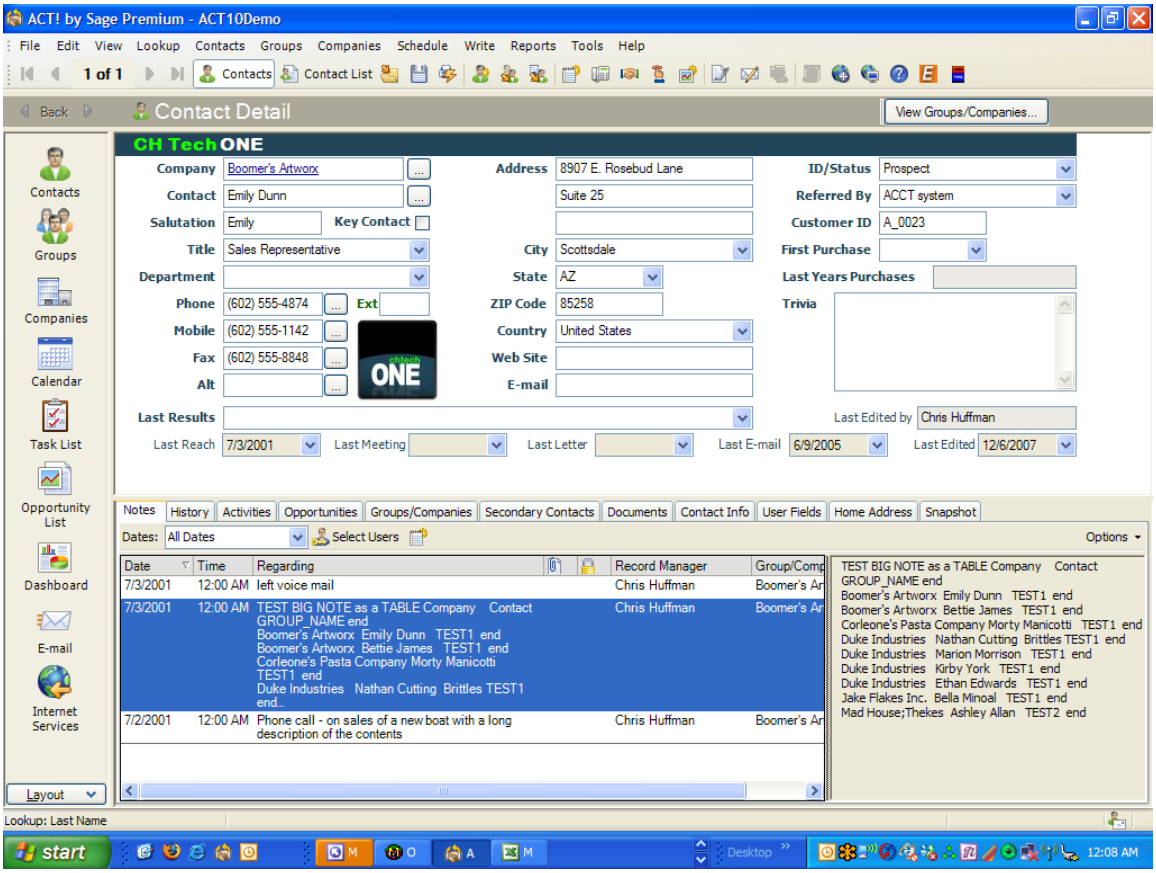
OAK!Merge User's Guide

Version 18.1.1 Revised December 8, 2015


ACT! by Sage Premium - ACT10Demo
File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help
Contact Detail
View Groups/Companies...
CH TechONE
Company Boomer's Artworx
Contact Emily Dunn
Salutation Emily
Key Contact
Title Sales Representative
Department
Phone (602) 555-4874 Ext
Mobile (602) 555-1142
Fax (602) 555-8848
Alt
Address 8907 E. Rosebud Lane
Suite 25
City Scottsdale
State AZ
ZIP Code 85258
Country United States
Web Site
E-mail
ID/Status Prospect
Referred By ACCT system
Customer ID A_0023
First Purchase
Last Years Purchases
Trivia
Last Results
Last Edited by Chris Huffman
Last Reach 7/3/2001
Last Meeting
Last Letter
Last E-mail 6/9/2005
Last Edited 12/6/2007
Contacts
Groups
Companies
Calendar
Task List
Opportunity List
Dashboard
E-mail
Internet Services
Layout
Notes History Activities Opportunities Groups/Companies Secondary Contacts Documents Contact Info User Fields Home Address Snapshot
Dates: All Dates
Select Users
Options
Date Time Regarding Record Manager Group/Comp
7/3/2001 12:00 AM left voice mail Chris Huffman Boomer's Ar
7/3/2001 12:00 AM TEST BIG NOTE as a TABLE Company Contact GROUP_NAME end Boomer's Artworx Emily Dunn TEST1 end Boomer's Artworx Bettie James TEST1 end Corleone's Pasta Company Morty Manicotti TEST1 end Duke Industries Nathan Cutting Brittles TEST1 end... Chris Huffman Boomer's Ar
7/2/2001 12:00 AM Phone call - on sales of a new boat with a long description of the contents Chris Huffman Boomer's Ar
TEST BIG NOTE as a TABLE Company Contact GROUP_NAME end
Boomer's Artworx Emily Dunn TEST1 end
Boomer's Artworx Bettie James TEST1 end
Corleone's Pasta Company Morty Manicotti TEST1 end
Duke Industries Nathan Cutting Brittles TEST1 end
Duke Industries Marion Morrison TEST1 end
Duke Industries Kirby York TEST1 end
Duke Industries Ethan Edwards TEST1 end
Jake Flakes Inc. Bella Minoal TEST1 end
Mad House;Thekes Ashley Allan TEST2 end
Lookup: Last Name
start
Desktop
12:08 AM

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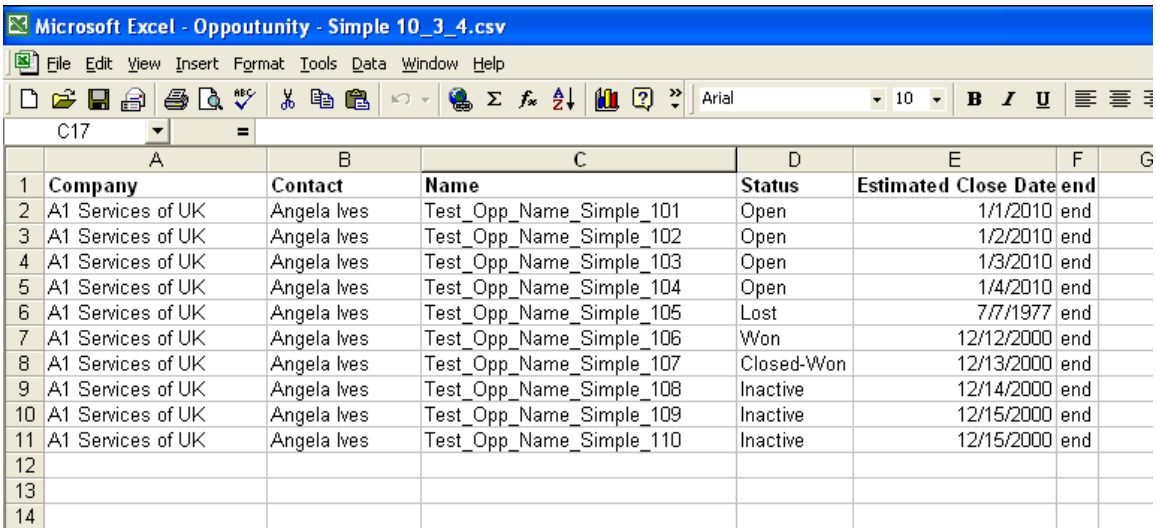
Example 6: Simple Opportunity Merge

C:\E Tech Systems\ACT\OAK!Merge 13\Samples\Oppoutunity_Simple_10_3_4.csv



	A	B	C	D	E	F	G
1	Company	Contact	Name	Status	Estimated Close Date	end	
2	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_101	Open	1/1/2010	end	
3	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_102	Open	1/2/2010	end	
4	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_103	Open	1/3/2010	end	
5	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_104	Open	1/4/2010	end	
6	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_105	Lost	7/7/1977	end	
7	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_106	Won	12/12/2000	end	
8	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_107	Closed-Won	12/13/2000	end	
9	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_108	Inactive	12/14/2000	end	
10	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_109	Inactive	12/15/2000	end	
11	A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_110	Inactive	12/15/2000	end	
12							
13							
14							

Company	Contact	Name	Status	Estimated Close Date	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_101	Open	1/1/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_102	Open	1/2/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_103	Open	1/3/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_104	Open	1/4/2010	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_105	Lost	7/7/1977	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_106	Won	12/12/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_107	Closed-Won	12/13/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_108	Inactive	12/14/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_109	Inactive	12/15/2000	end
A1 Services of UK	Angela Ives	Test_Opp_Name_Simple_110	Inactive	12/15/2000	end

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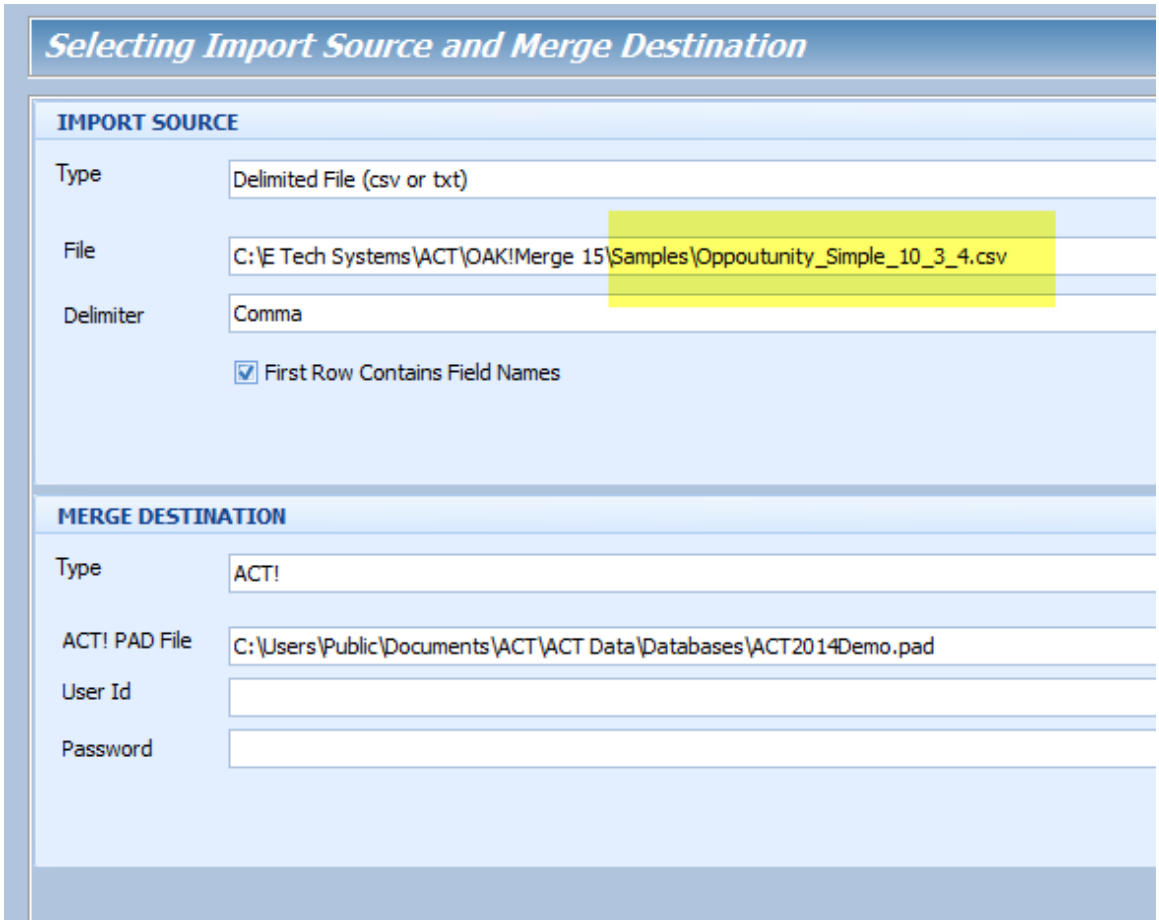
Version 18.1.1 Revised December 8, 2015



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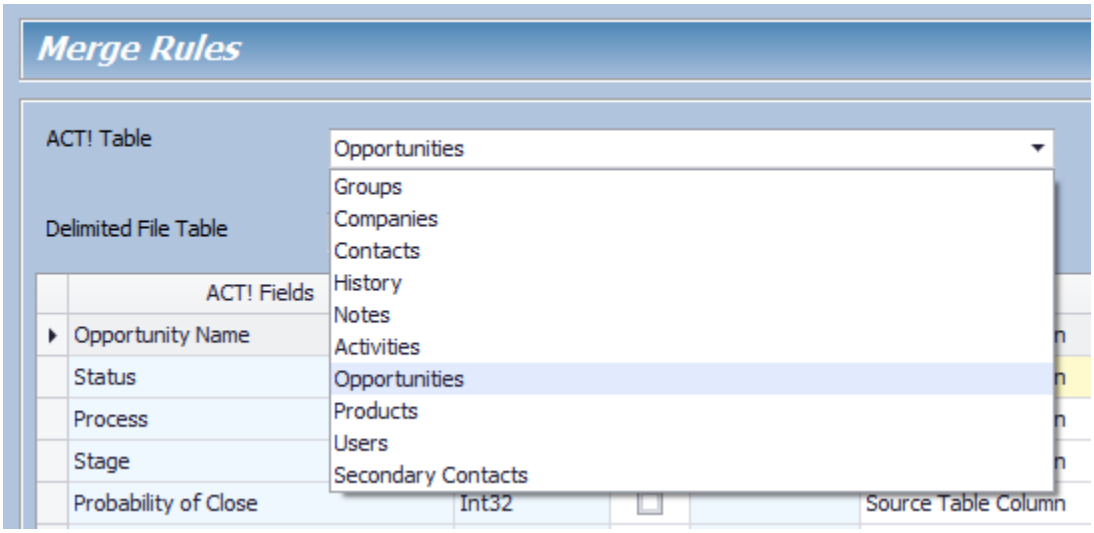
Select Opportunity Table



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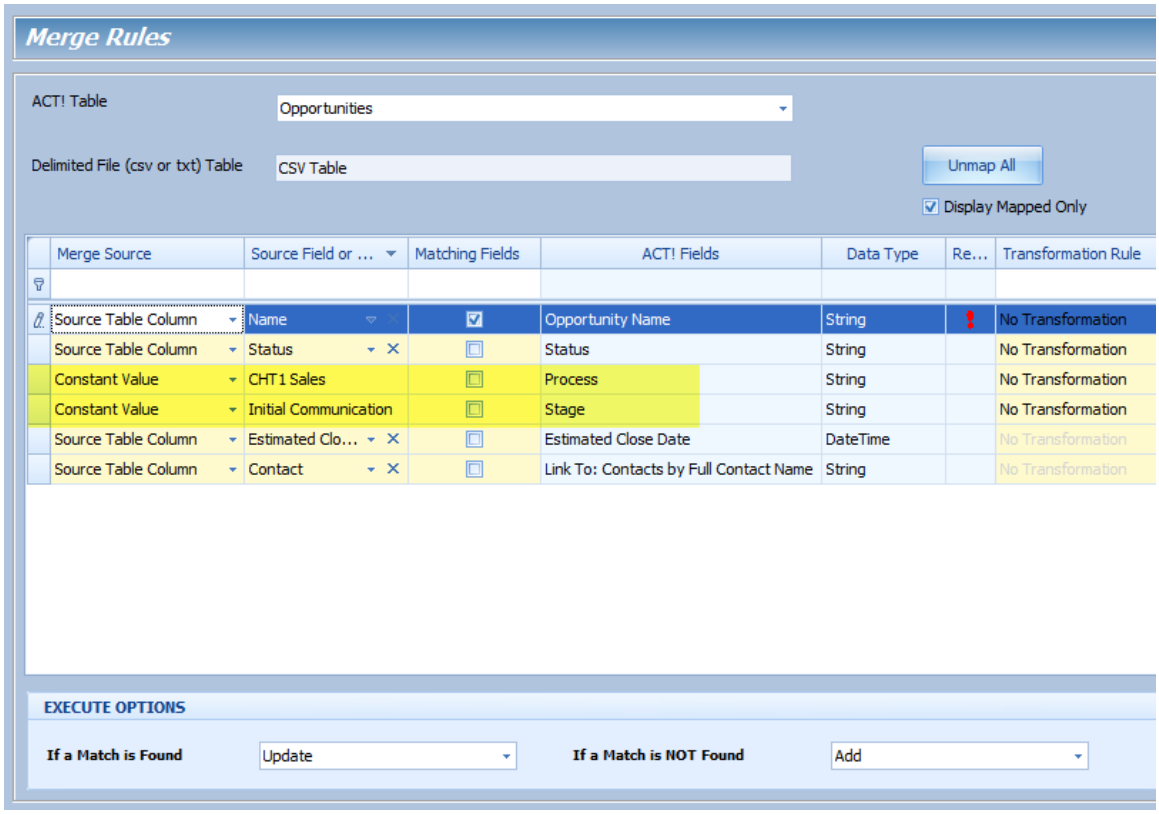
Set the Mappings and execute options at the bottom
This one is set to match on opportunity name, update it IF it is found; otherwise ADD it. Each opportunity is also LINKED to contacts and companies. Linking is optional for opportunities, but is usually done to tie the opportunity to a contact. The OAKMergeID field can also be used for linking. See example 17 or OAKMergeID in the index for more information.

Process and stage are required fields and are not in the sample CSV so you have to add them to the mapping as Constant Values. They could be in the CSV and different for each opportunity. If they are not valid in the target database, that row, OAK!Merge will try one from the demo database: Process: CH1 Sales and Stage: Initial Communication. If that fails, then the row is skipped do to an error. See Appendix on Errors and Warnings for other messages.



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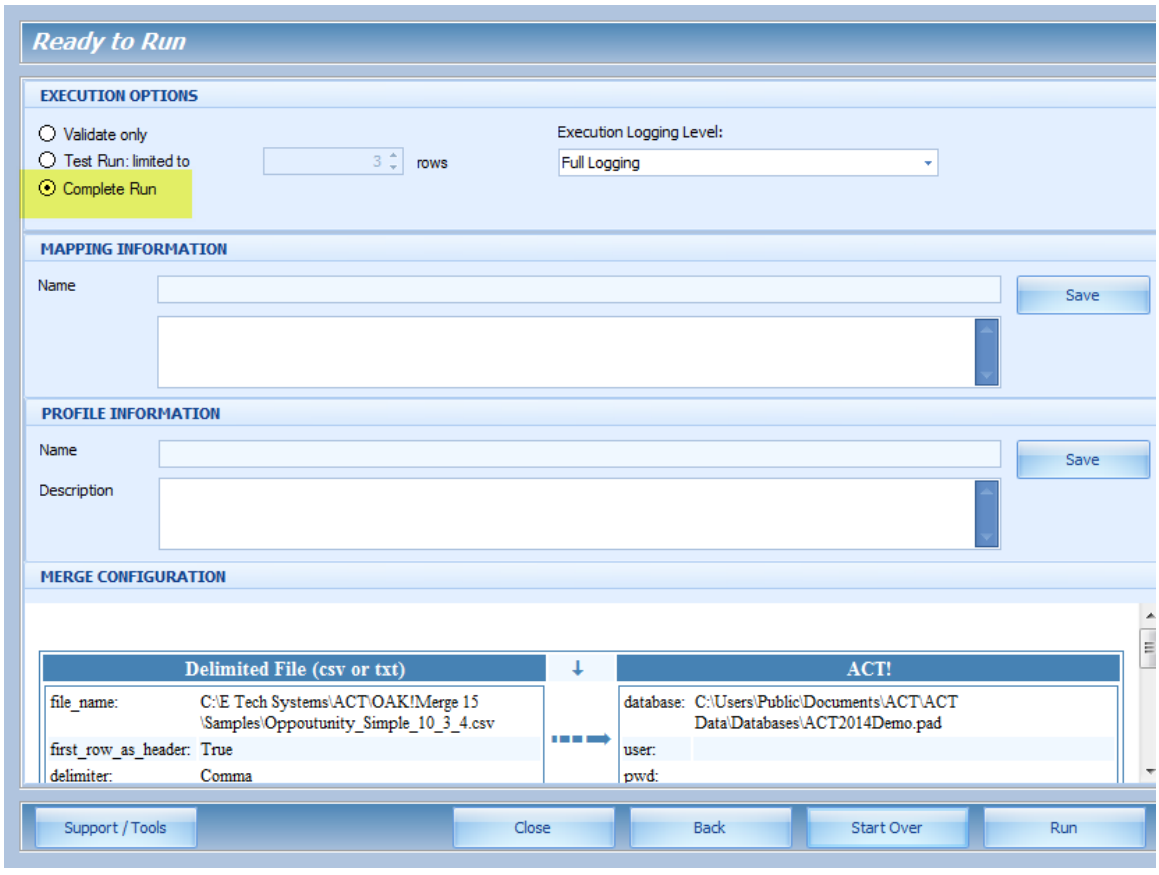
Status for Opportunities can be specified as:

- **Open**
- **Won OR Closed – Won**
- **Lost OR Closed – Lost**
- **Inactive**

Select Complete Run



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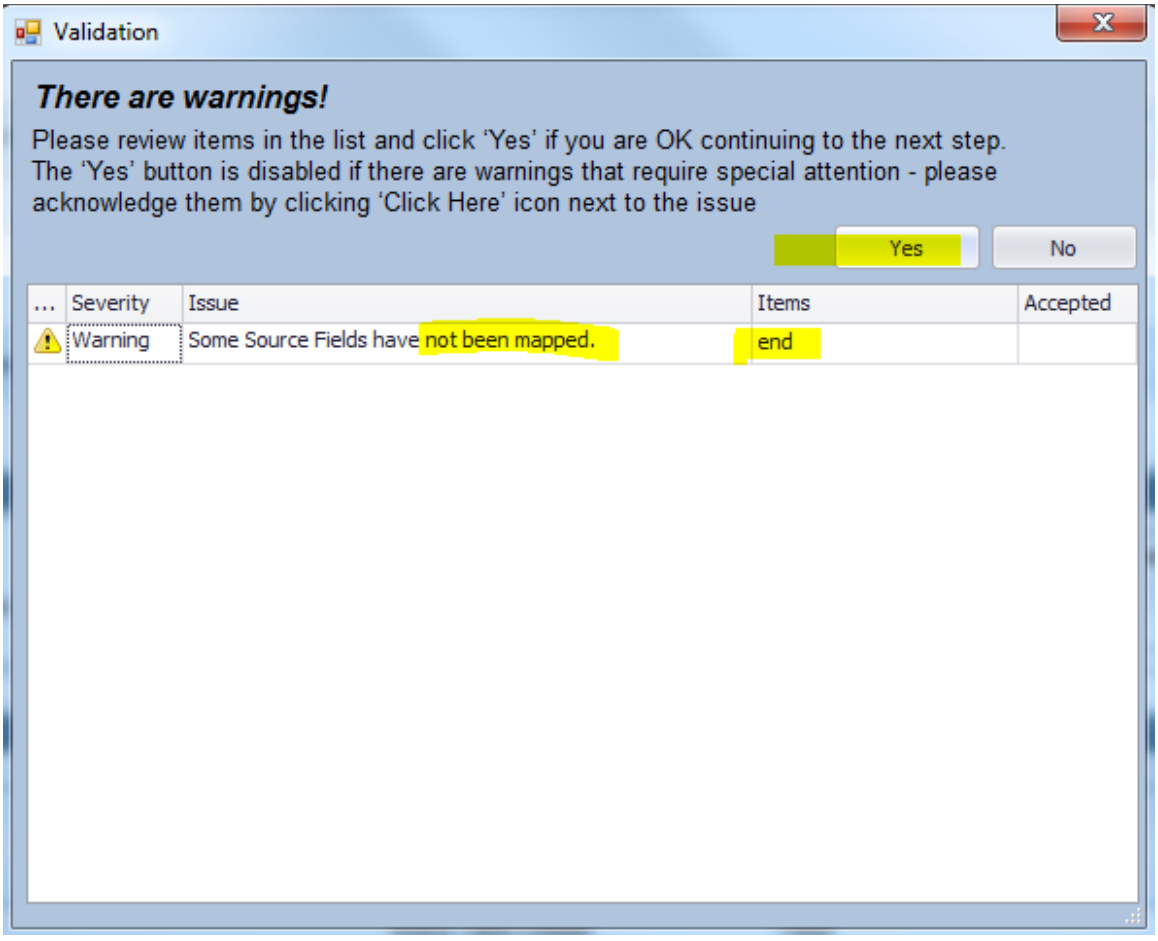
You will receive a validation dialog box if you have fields not mapped, or mapped to more than one field, or appending only, etc. Review the warnings and select Yes if you want to proceed as is.

The "end" field is used in some of the examples as a way to visually review the CSV in excel to verify it has the right delimiters. It is not mapped in OAK!Merge.

In some you have to each row "OK" to proceed; then the yes button


Validation
There are warnings!
Please review items in the list and click 'Yes' if you are OK continuing to the next step.
The 'Yes' button is disabled if there are warnings that require special attention - please acknowledge them by clicking 'Click Here' icon next to the issue
Yes
No
... Severity Issue Items Accepted
Warning Some Source Fields have not been mapped. end

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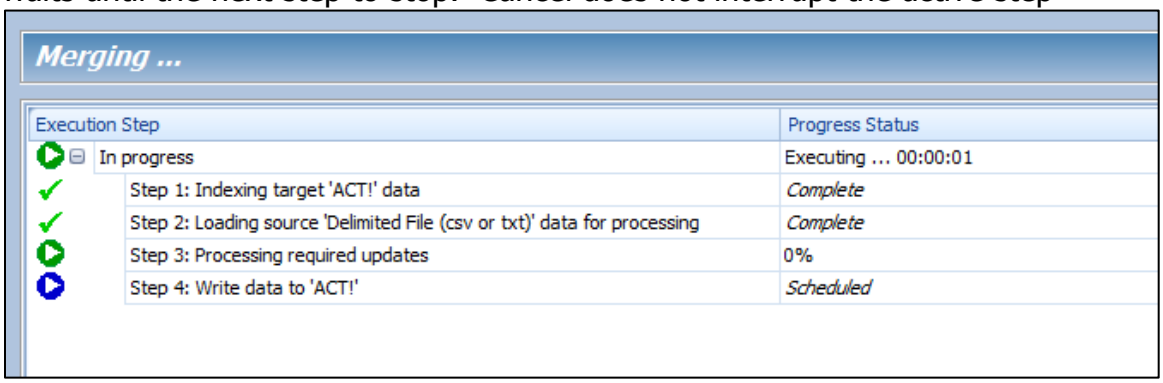
The progress bars give you the overall status of the merge. If you cancel, it waits until the next step to stop. Cancel does not interrupt the active step



Results page appears next.

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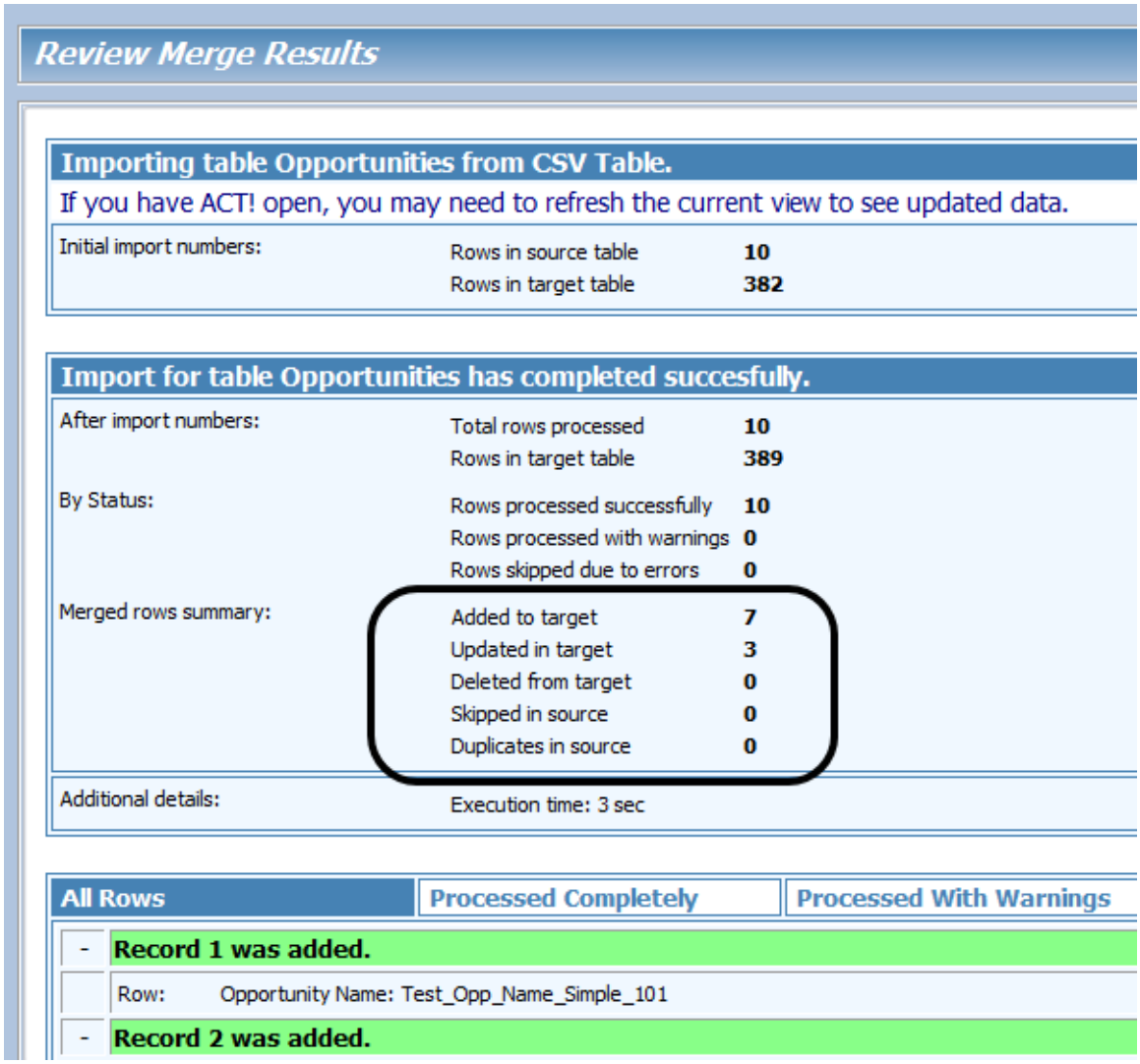
Review Merge Results
Importing table Opportunities from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.
Initial import numbers:
Rows in source table 10
Rows in target table 382
Import for table Opportunities has completed succesfully.
After import numbers:
Total rows processed 10
Rows in target table 389
By Status:
Rows processed successfully 10
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added to target 7
Updated in target 3
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 3 sec
All Rows
Processed Completely
Processed With Warnings
- Record 1 was added.
Row: Opportunity Name: Test_Opp_Name_Simple_101
- Record 2 was added.

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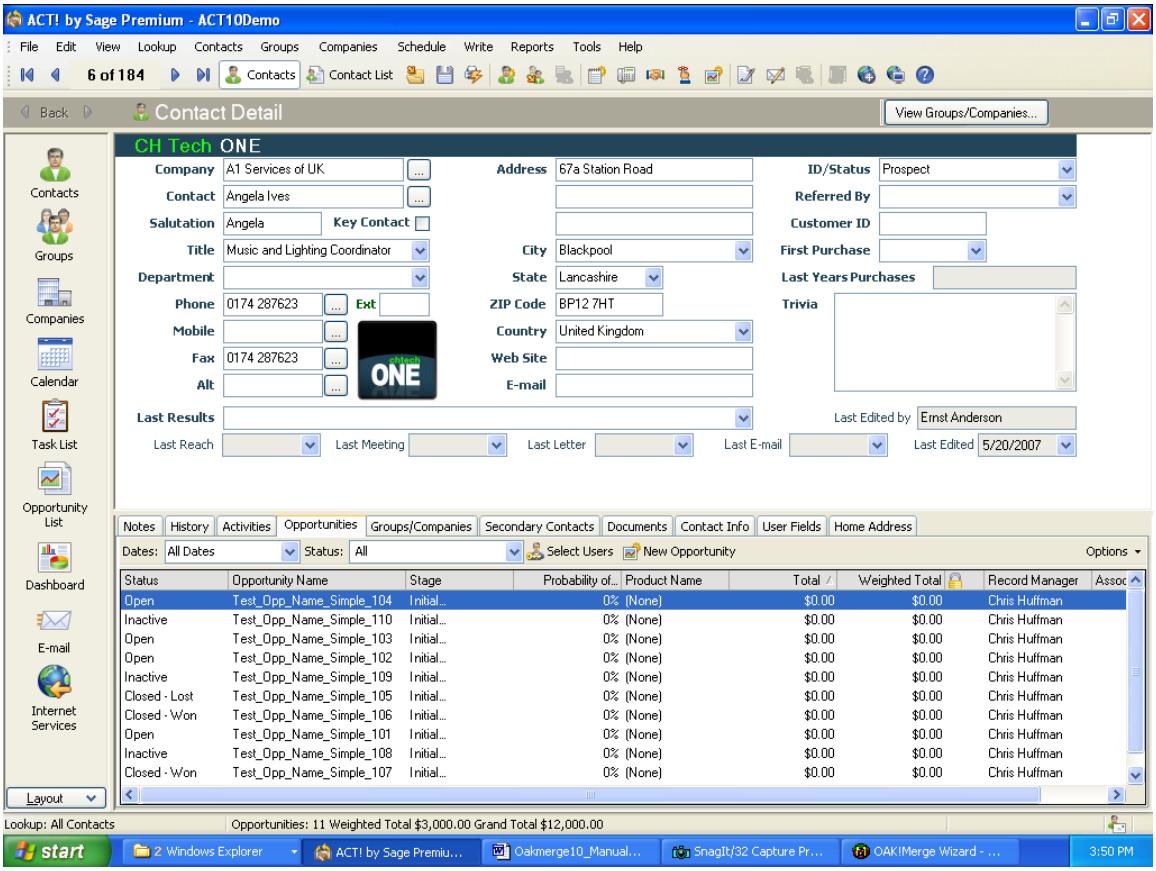

TIP: The Total and Weighted dollar amount fields are not updateable. if you want Opportunities to have a Total and Weighted dollar amount , you must add at least one product

Y

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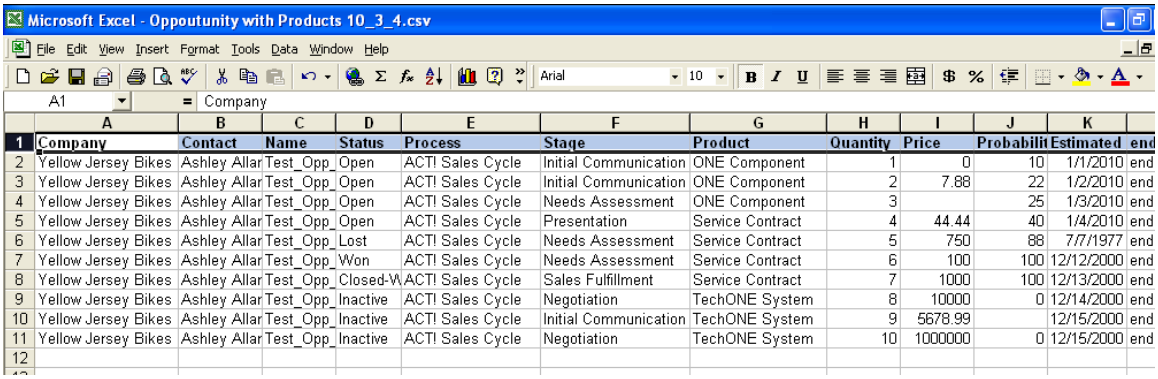
Example 7: Opportunity Merge with one Product

A simple merge with one product per Opportunity:

Source File Example



	A	B	C	D	E	F	G	H	I	J	K
1	Company	Contact	Name	Status	Process	Stage	Product	Quantity	Price	Probabilit	Estimated
2	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Open	ACT! Sales Cycle	Initial Communication	ONE Component	1	0	10	1/1/2010
3	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Open	ACT! Sales Cycle	Initial Communication	ONE Component	2	7.88	22	1/2/2010
4	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Open	ACT! Sales Cycle	Needs Assessment	ONE Component	3		25	1/3/2010
5	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Open	ACT! Sales Cycle	Presentation	Service Contract	4	44.44	40	1/4/2010
6	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Lost	ACT! Sales Cycle	Needs Assessment	Service Contract	5	750	88	7/7/1977
7	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Won	ACT! Sales Cycle	Needs Assessment	Service Contract	6	100	100	12/12/2000
8	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Closed-W	ACT! Sales Cycle	Sales Fulfillment	Service Contract	7	1000	100	12/13/2000
9	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Inactive	ACT! Sales Cycle	Negotiation	TechONE System	8	10000	0	12/14/2000
10	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Inactive	ACT! Sales Cycle	Initial Communication	TechONE System	9	5678.99		12/15/2000
11	Yellow Jersey Bikes	Ashley Allar	Test_Opp_	Inactive	ACT! Sales Cycle	Negotiation	TechONE System	10	1000000	0	12/15/2000
12											

Company	Contact	Name	Status	Process	Stage	Product
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c101	Open	Act! Sales Cycle	Initial Communication	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c102	Open	Act! Sales Cycle	Initial Communication	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c103	Open	Act! Sales Cycle	Needs Assessment	ONE Component
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c104	Open	Act! Sales Cycle	Presentation	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c105	Lost	Act! Sales Cycle	Needs Assessment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c106	Won	Act! Sales Cycle	Needs Assessment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c107	Closed-Won	Act! Sales Cycle	Sales Fulfillment	Service Contract
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c108	Inactive	Act! Sales Cycle	Negotiation	TechONE System
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c109	Inactive	Act! Sales Cycle	Initial Communication	TechONE System
Yellow Jersey Bikes	Ashley Allan	Test_Opp_Name_c110	Inactive	Act! Sales Cycle	Negotiation	TechONE System

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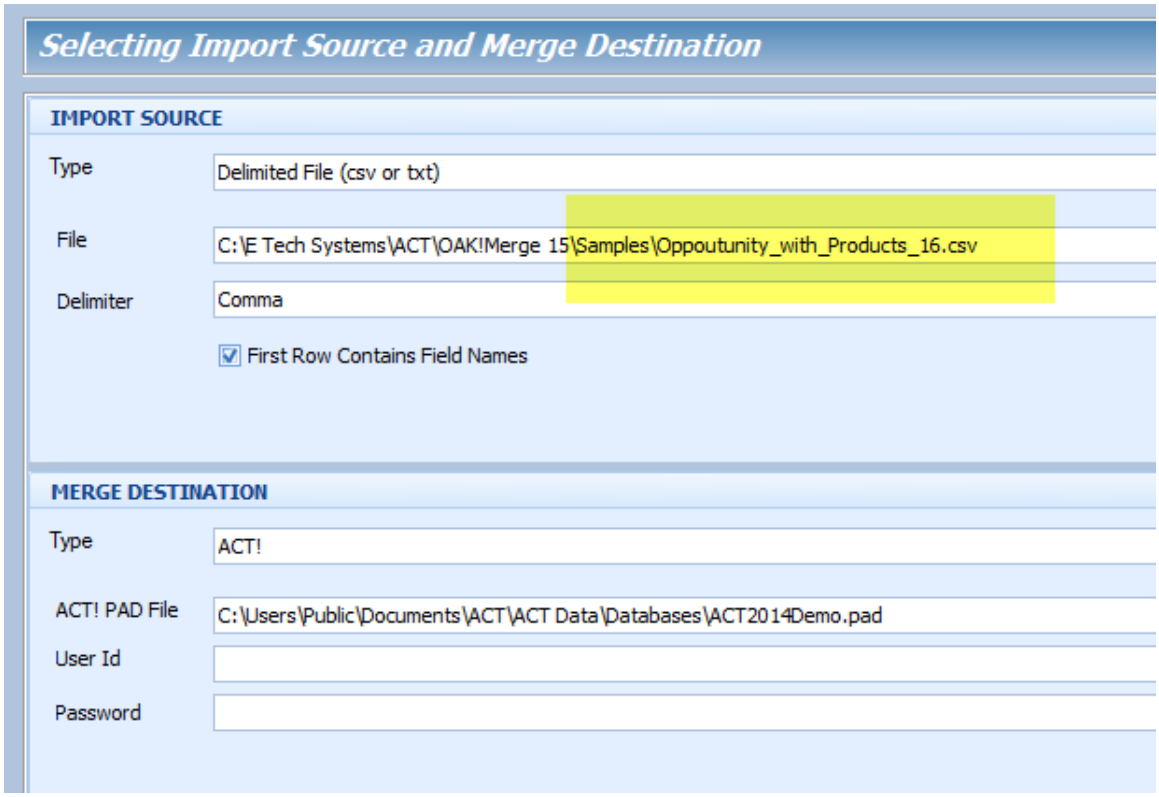

Or optionally use OAKMergeIDs to link the Opportunities to the contacts. First update the OAKMergeID field in the contact; then you can link to the Contact using OAKMergeID. Sample file is Oppoutunity_with_Products_and_OAK!MergeIDs_12_4.csv

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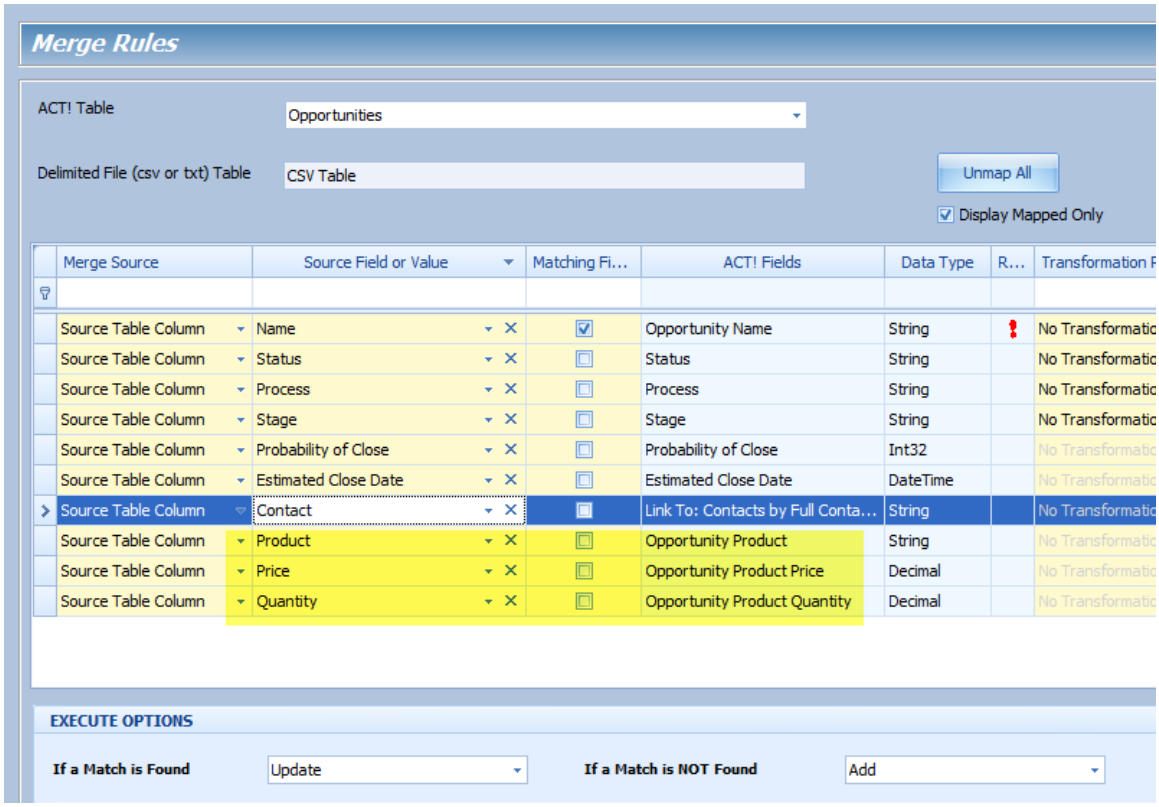
Map: Product, Price, and Quantity to add a product



TIP: If you link it to contact and the contact does not exist a new contact will NOT be added. The opportunity shows up under the Act! "my record" of the user login used for doing the import.

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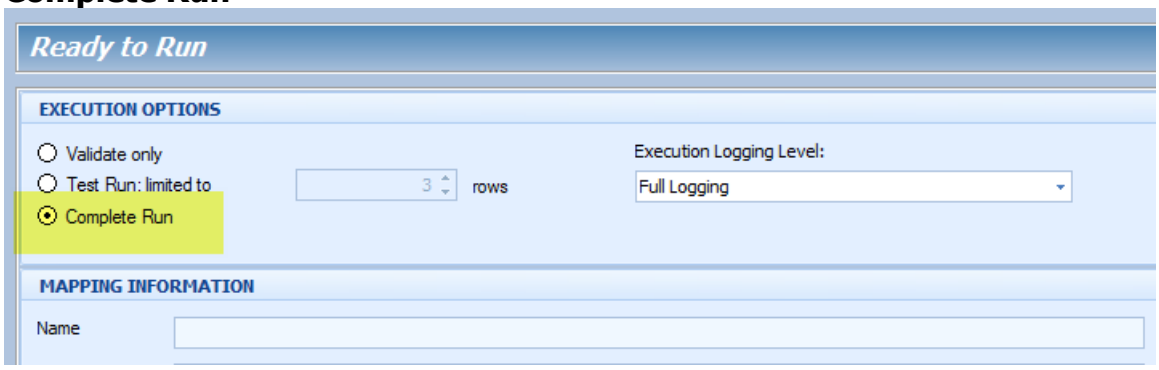
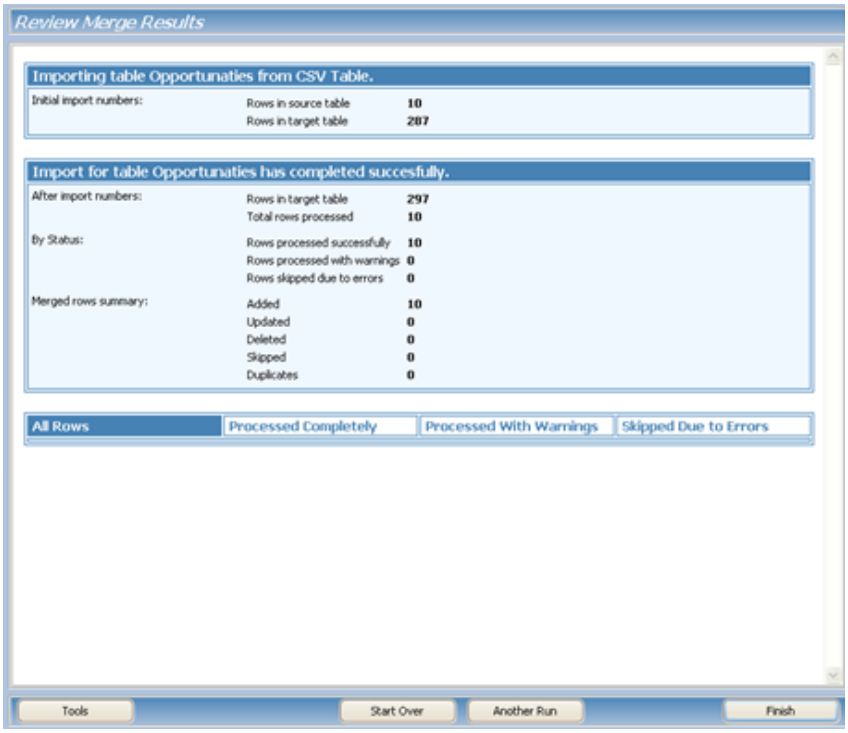
Complete Run



Results:



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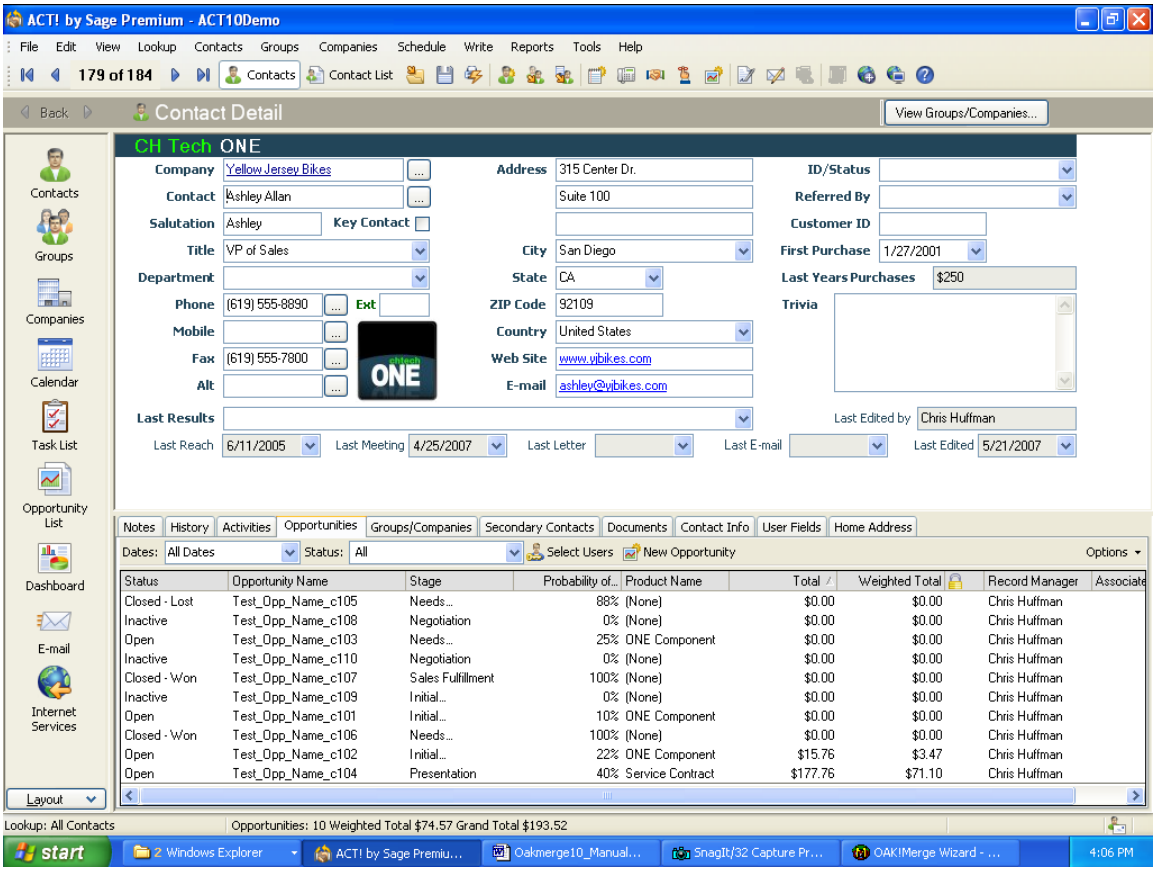
ACT! by Sage Premium - ACT10Demo
File Edit View Lookup Contacts Groups Companies Schedule Write Reports Tools Help
179 of 184
Contacts
Contact List
Back
Contact Detail
View Groups/Companies...
CH Tech ONE
Company Yellow Jersey Bikes
Contact Ashley Allan
Salutation Ashley
Key Contact
Title VP of Sales
Department
Phone (619) 555-8890
Ext
Mobile
Fax (619) 555-7800
Alt
Address 315 Center Dr.
Suite 100
City San Diego
State CA
ZIP Code 92109
Country United States
Web Site www.yjbikes.com
E-mail ashley@yjbikes.com
ID/Status
Referred By
Customer ID
First Purchase 1/27/2001
Last Years Purchases $250
Trivia
Last Results
Last Edited by Chris Huffman
Last Reach 6/11/2005
Last Meeting 4/25/2007
Last Letter
Last E-mail
Last Edited 5/21/2007
Contacts
Groups
Companies
Calendar
Task List
Opportunity List
Dashboard
E-mail
Internet Services
Layout
Notes History Activities Opportunities Groups/Companies Secondary Contacts Documents Contact Info User Fields Home Address
Dates: All Dates
Status: All
Select Users
New Opportunity
Options
Status | Opportunity Name | Stage | Probability of... | Product Name | Total | Weighted Total | Record Manager | Associate
Closed - Lost | Test_Opp_Name_c105 | Needs... | 88% | (None) | $0.00 | $0.00 | Chris Huffman
Inactive | Test_Opp_Name_c108 | Negotiation | 0% | (None) | $0.00 | $0.00 | Chris Huffman
Open | Test_Opp_Name_c103 | Needs... | 25% | ONE Component | $0.00 | $0.00 | Chris Huffman
Inactive | Test_Opp_Name_c110 | Negotiation | 0% | (None) | $0.00 | $0.00 | Chris Huffman
Closed - Won | Test_Opp_Name_c107 | Sales Fulfillment | 100% | (None) | $0.00 | $0.00 | Chris Huffman
Inactive | Test_Opp_Name_c109 | Initial... | 0% | (None) | $0.00 | $0.00 | Chris Huffman
Open | Test_Opp_Name_c101 | Initial... | 10% | ONE Component | $0.00 | $0.00 | Chris Huffman
Closed - Won | Test_Opp_Name_c106 | Needs... | 100% | (None) | $0.00 | $0.00 | Chris Huffman
Open | Test_Opp_Name_c102 | Initial... | 22% | ONE Component | $15.76 | $3.47 | Chris Huffman
Open | Test_Opp_Name_c104 | Presentation | 40% | Service Contract | $177.76 | $71.10 | Chris Huffman
Lookup: All Contacts
Opportunities: 10 Weighted Total $74.57 Grand Total $193.52
start
2 Windows Explorer
ACT! by Sage Premiu...
Oakmerge10_Manual...
SnagIt/32 Capture Pr...
OAK!Merge Wizard - ...
4:06 PM

You can match on any field or fields in the opportunity if you want to find and update or delete an opportunity.

TIP: : You can create a custom field in the opportunity called OAKMergeID if you want to use it to LINK other table info like History back to the opportunity.

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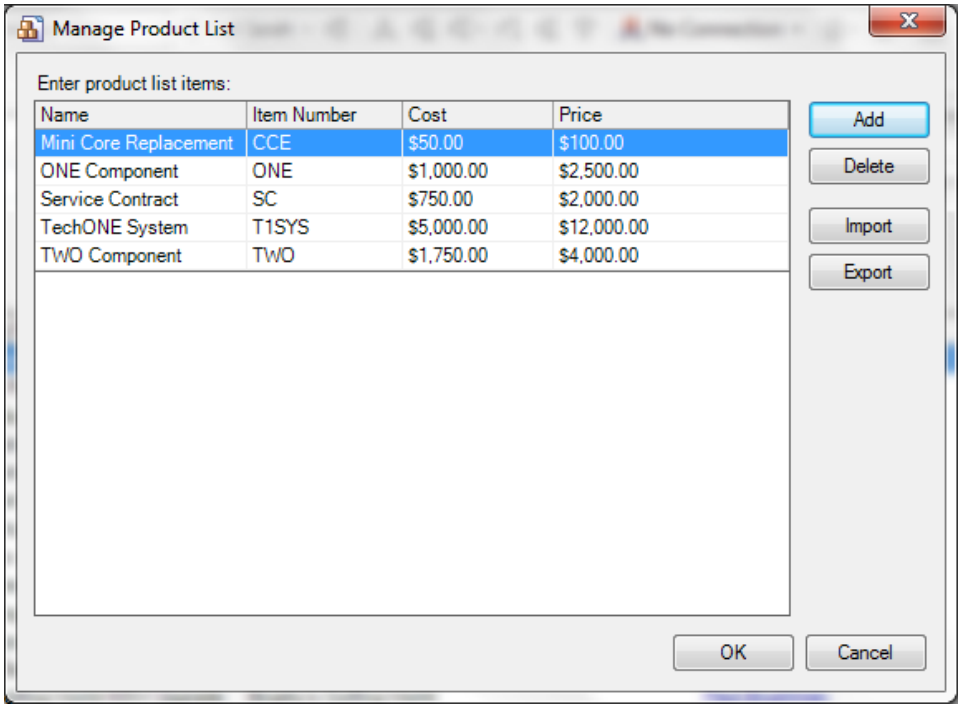
Example 8: Merging info into the PRODUCT table

You can have products in Opportunity merges, but they must be valid product names in Act! . You can manually create the products in ACT or import the product names with OAK!Merge before importing opportunities with Products.

When you import info to the Products area of Act! only 4 fields are available to map to. No custom Product fields are available in the Products table. Custom Product fields can be used for a specific Opportunity. You cannot set defaults for a custom product fields.
Act!'s Manage products view and table do not have custom fields:



When you add custom Product fields in the Define Fields area, they do not show up in the view above.

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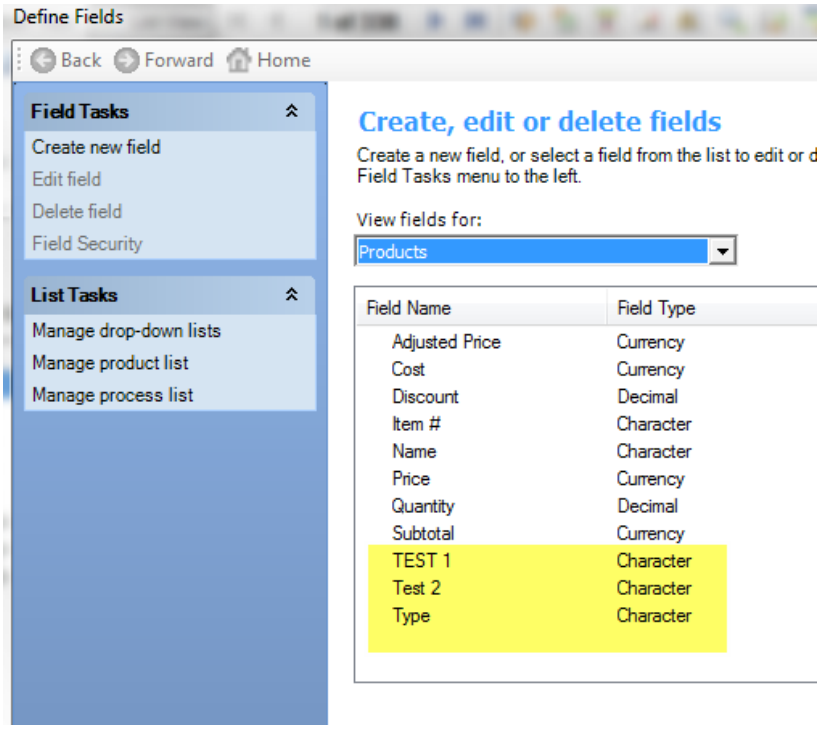
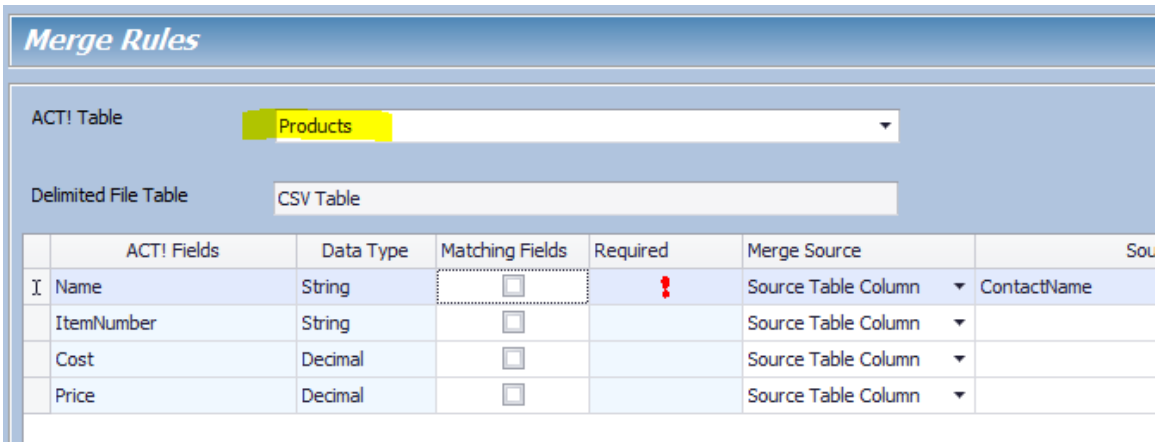


Sample import to the Product table: has 4 fields you can update.



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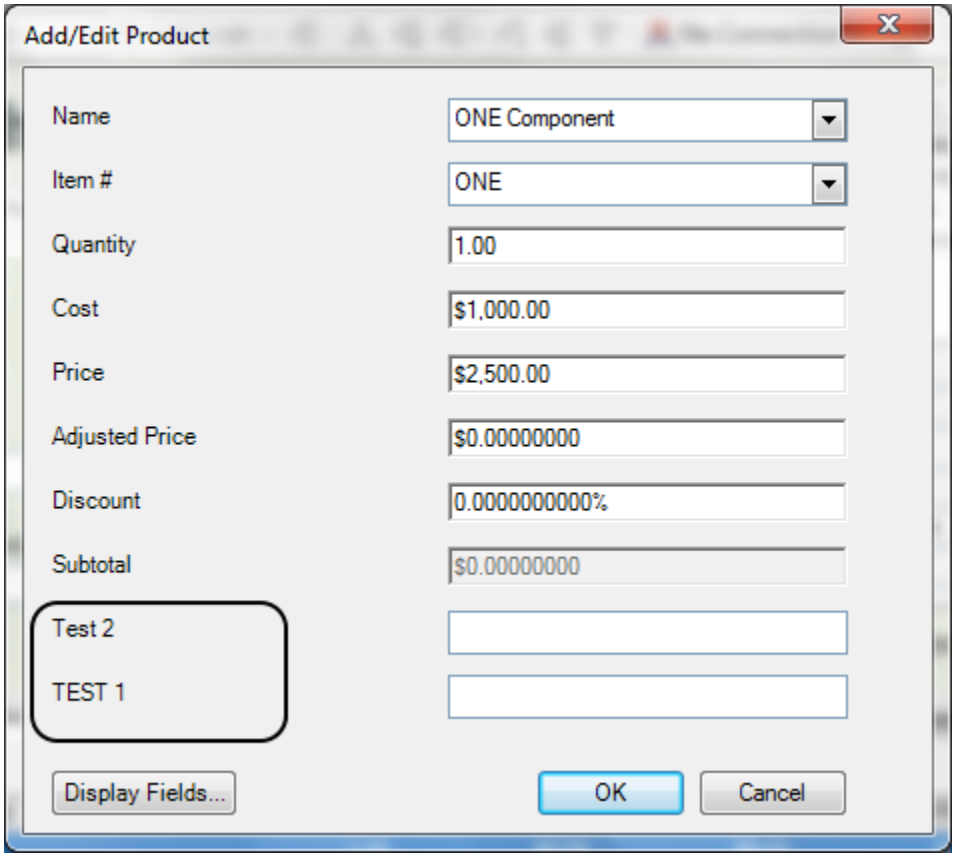
When you add custom fields for the products, they ARE available to store data with each opportunity



There are 2 ways (Tables) that OAK!Merge can add products to an Opportunity.

You can have products in Opportunity merges, but it is only one product at a time if you are doing an opportunity update. If you need three products on the same opportunity, you would need to do one merge to the Product_Opportunity Table or three merges to the Opportunity table: One to add the opportunity along with the 1st product and then two more to add one product each.

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Example 9: Multiple Products to Multiple Opportunities Merges

You can merge

Add one or more products to existing Opportunities by selecting the target table of Products_Opportunties,

The Opportunity and the products must exist before the merge. If not, the row will be skipped and no error/warning is reported.

SAMPLE Merge file: Products for Opportunties.csv

	A	B	C	D	E	F
1	Name of OPP for LINKING	Product Name for LINKING	Quantity	Price	Desc-Test	Test Number as Text
2	Test_Opp_Name_c101	TechONE System	1	50000	Custom Field info 1	$10,001
3	Test_Opp_Name_c101	ONE Component	2	350	Custom Field info 2	$10,002
4	Test_Opp_Name_c101	ONE Component	3	355	Custom Field info 3	$10,003
5	Test_Opp_Name_c101	Service Contract	4	4000	Custom Field info 4	$10,004
6	Test_Opp_Name_c101	Service Contract	5	299	Custom Field info 5	$10,005
7	Widget Corporation-Replacement Parts	ONE Component	6	360	Custom Field info 6	$10,006
8	Widget Corporation-Replacement Parts	TechONE System	7	80000	Custom Field info 7	$10,007
9	Widget Corporation-Replacement Parts	Service Contract	8	3500	Custom Field info 8	$10,008
10	Boomer's Artworx	TechONE System	9	99000.99	Custom Field info 9	$10,009
11	Boomer's Artworx	Service Contract	10	2500.88	Custom Field info 10	$10,010
12						

This example includes 2 optional custom product fields: Test1 and Test2

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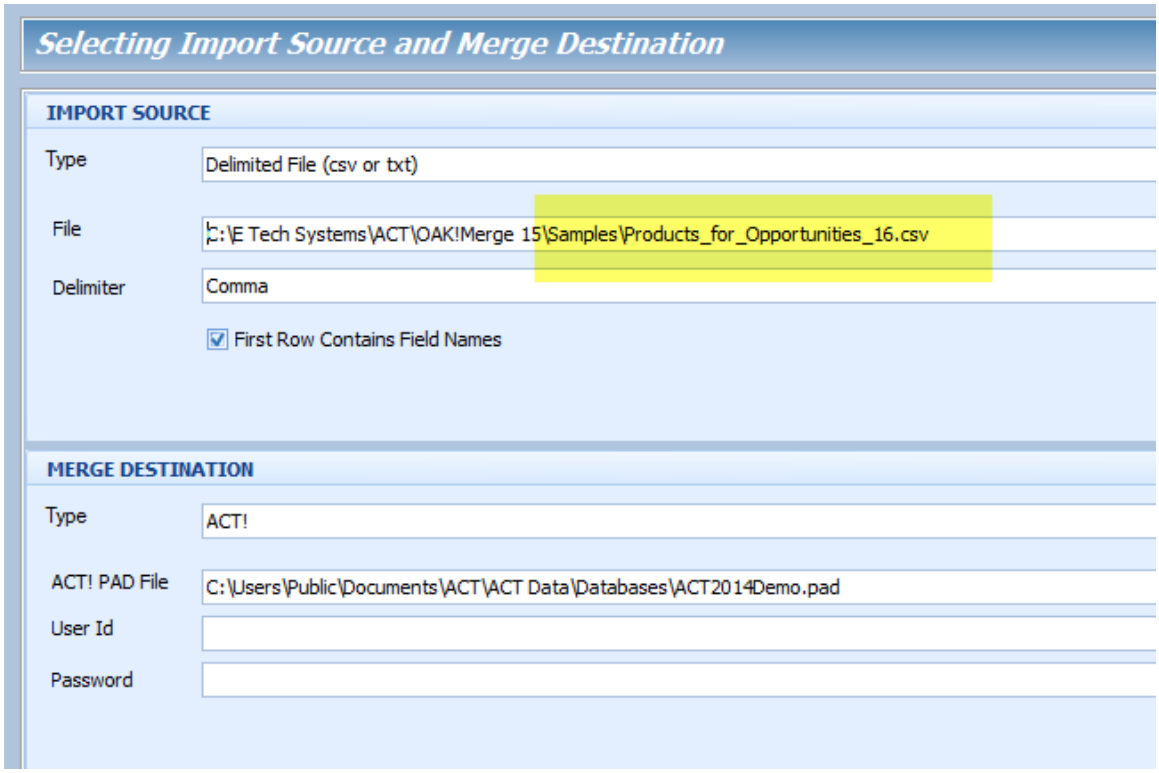
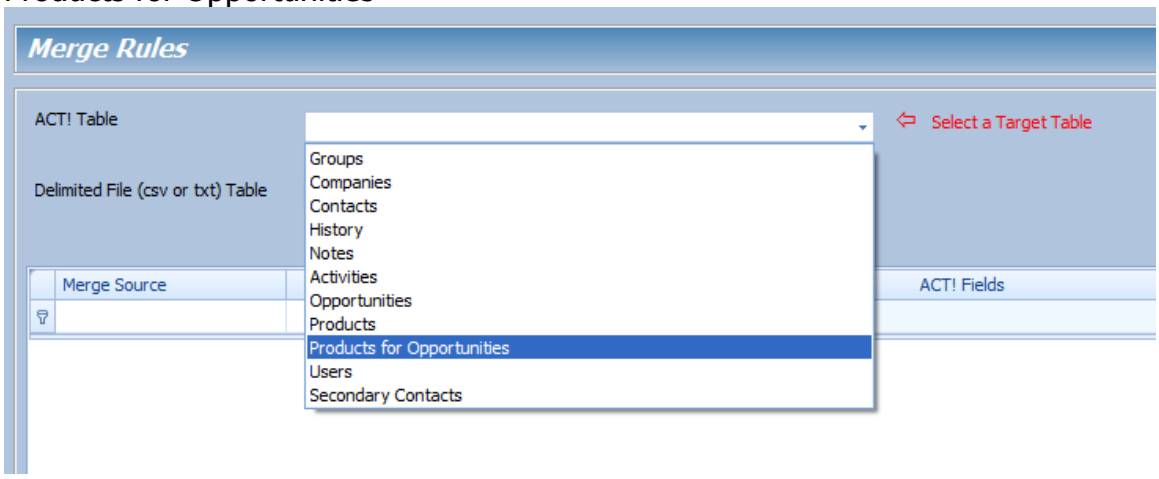


Select

Products for Opportunities



Map the info.

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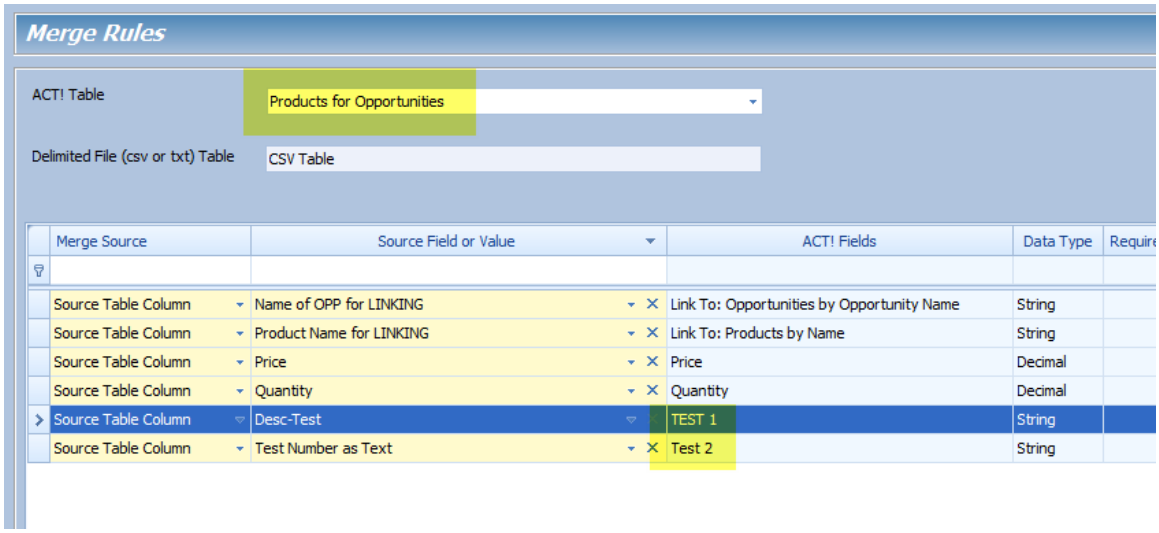
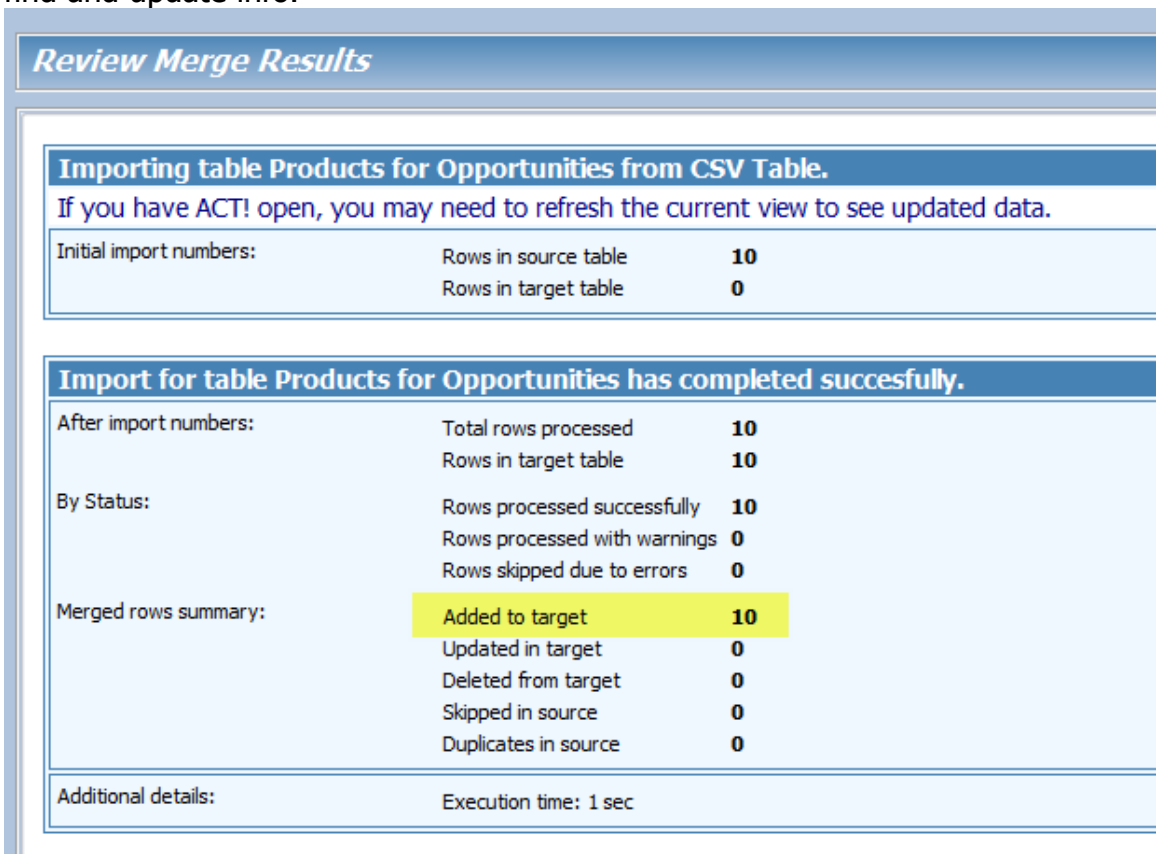


Run the merge and get the results; It is an append only merge. No matching to find and update info.


Review Merge Results
Importing table Products for Opportunities from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated data.
Initial import numbers:
Rows in source table 10
Rows in target table 0
Import for table Products for Opportunities has completed succesfully.
After import numbers:
Total rows processed 10
Rows in target table 10
By Status:
Rows processed successfully 10
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added to target 10
Updated in target 0
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec

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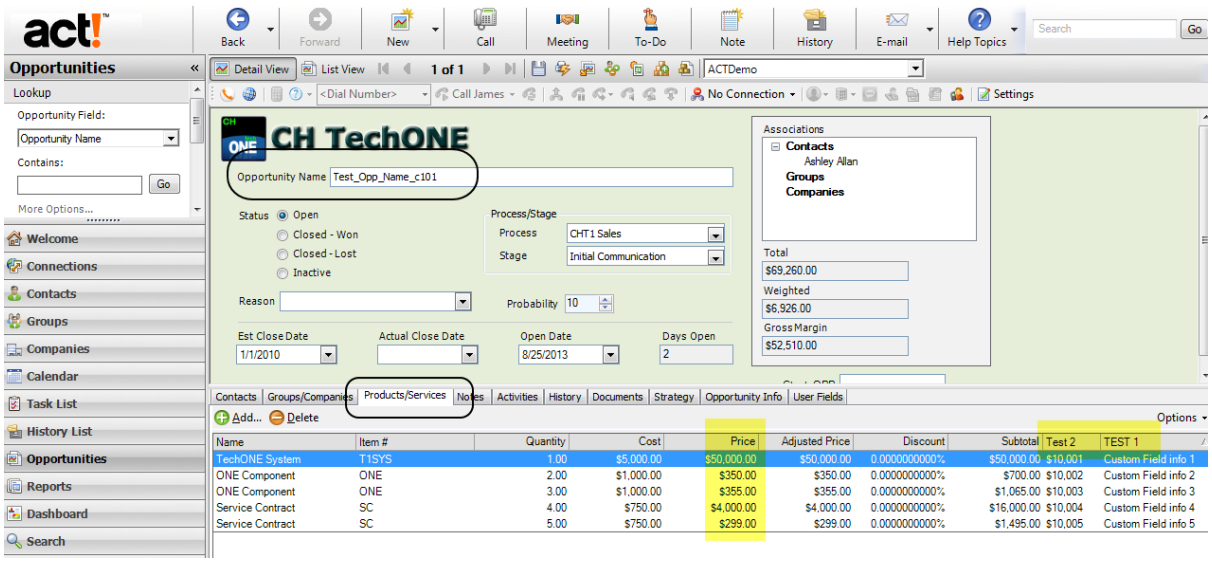
In Act!, the products are added to the opportunity



Fields available for mapping include any custom product fields.

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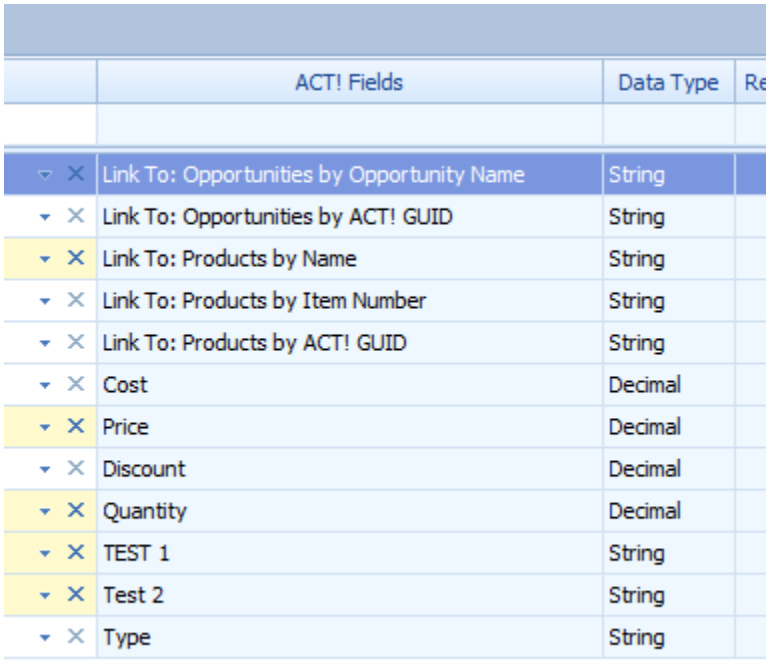
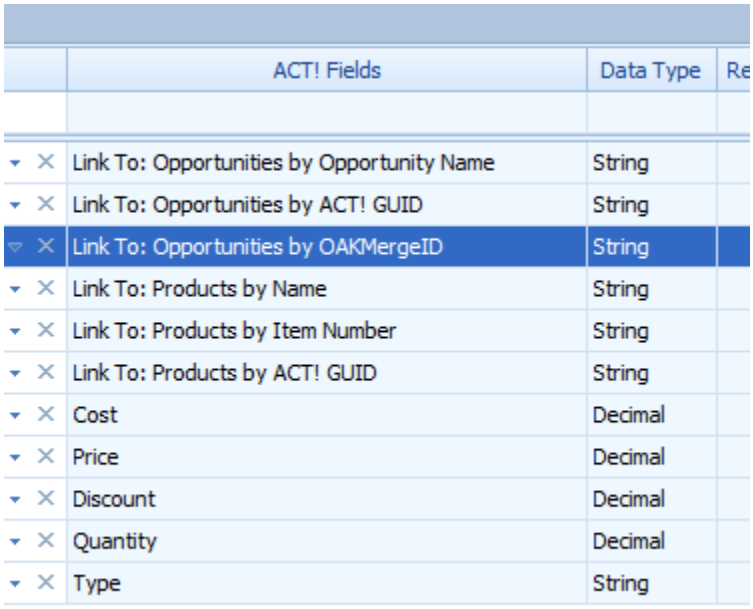


ACT! Fields	Data Type	Re
Link To: Opportunities by Opportunity Name	String	
Link To: Opportunities by ACT! GUID	String	
Link To: Products by Name	String	
Link To: Products by Item Number	String	
Link To: Products by ACT! GUID	String	
Cost	Decimal	
Price	Decimal	
Discount	Decimal	
Quantity	Decimal	
TEST 1	String	
Test 2	String	
Type	String	

If Opportunities have a custom field called OAKMergeID, then that is a 3rd option for LINKING products to the Opportunity.



ACT! Fields	Data Type	Re
Link To: Opportunities by Opportunity Name	String	
Link To: Opportunities by ACT! GUID	String	
Link To: Opportunities by OAKMergeID	String	
Link To: Products by Name	String	
Link To: Products by Item Number	String	
Link To: Products by ACT! GUID	String	
Cost	Decimal	
Price	Decimal	
Discount	Decimal	
Quantity	Decimal	
Type	String	

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TIP: To use the GUID for linking, you would need to create the opportunities, then export them using OAK!Merge to expose the Opportunity GUIDs

r Contacts, Companies, Groups, Opportunities and Products.

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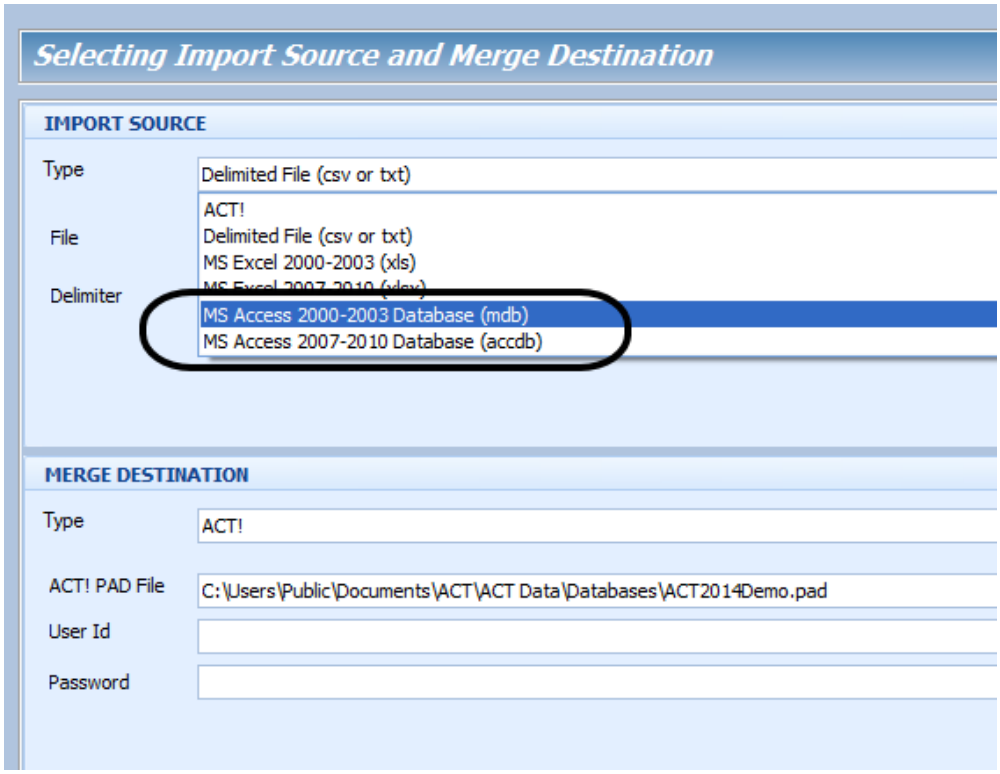
Example 10: Using an ACCESS database as a Source

Pick MS ACCESS DATABASE as the source



ACCESS 2003, 2007 , or 2010 is supported

TIP: : User ID/Password is often not required for **Act!** or ACCESS.

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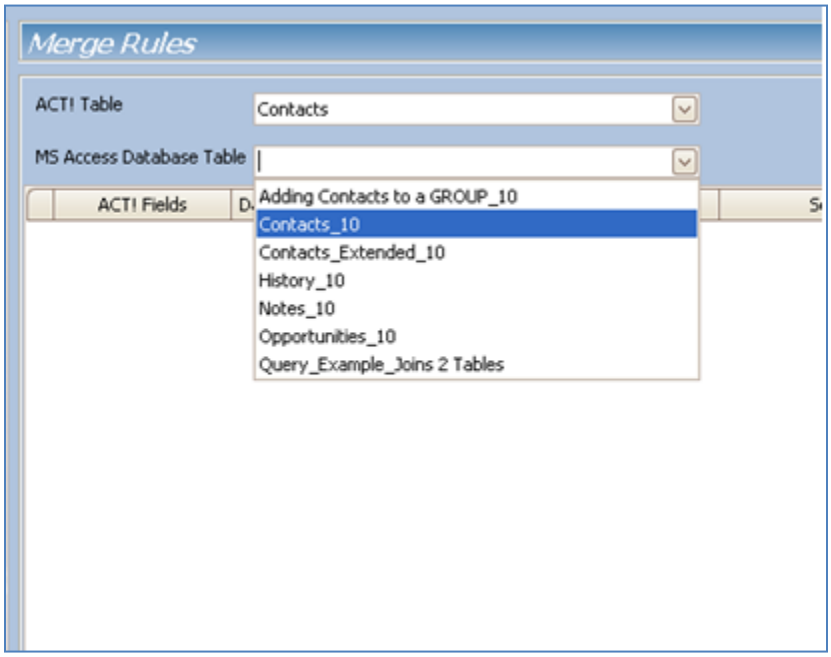
Select your Source Table or Query



and continue merge as other merge examples.

TIP: : An ACCESS query may include a table connected to an external data source like a SQL server or may have joins that pull selected data from several tables. Fresh data will be extracted each time OAK!Merge opens and runs.

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Example 11: Act! Activities Merge - Simple

A simple merge of activities is the sample file: Activities_Simple_11_1.csv
The Advanced version of **OAK!Merge** supports merges to the **Act!** Activity table.

	A	B	C	D	E
1	Contact	Type	Regarding	Start Time	
2	Sean Duffy	Call	Test_Activity_Regarding_01	1/1/2010 8:01	
3	Sean Duffy	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	
4	Sean Duffy	To-do	Test_Activity_Regarding_03	1/3/2010 16:00	
5	Sean Duffy	Vacation	Test_Activity_Regarding_04	1/4/2010 21:00	
6					
7					

Pick type as delimited file

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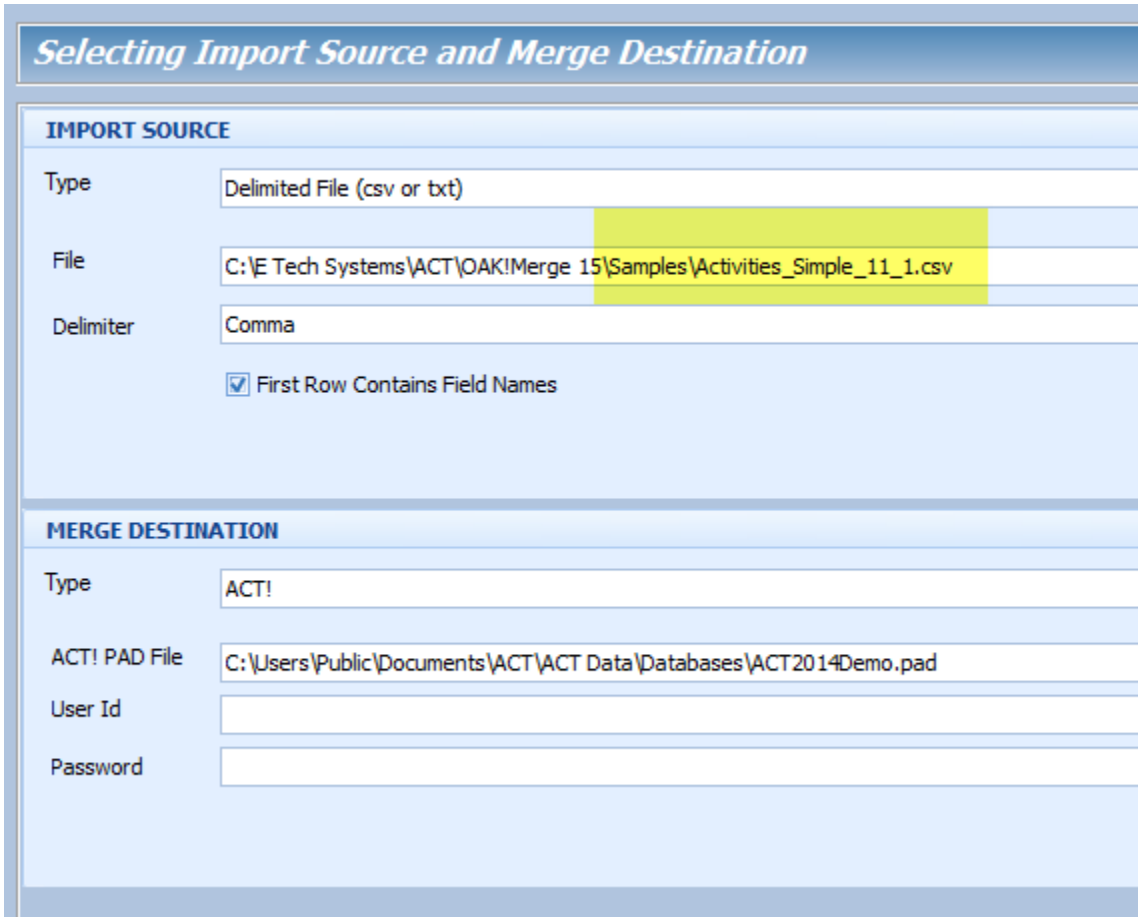

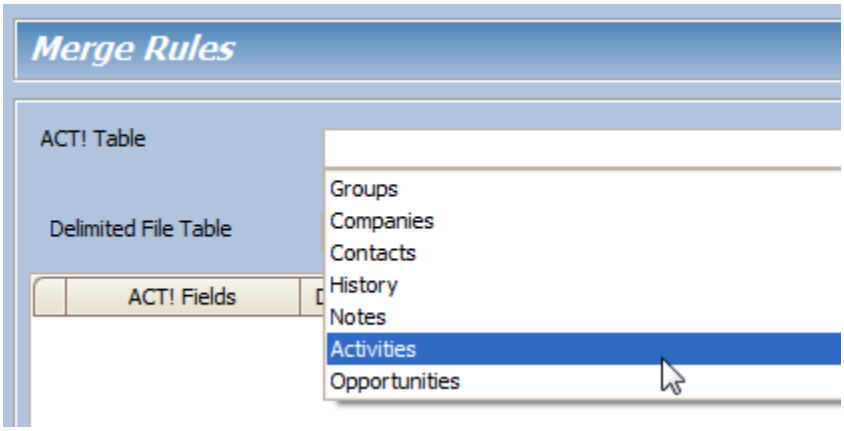

Map as shown

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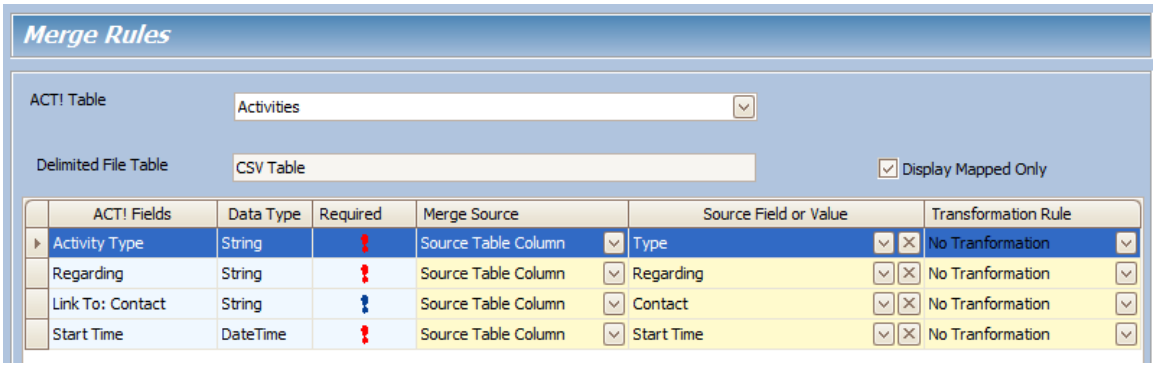
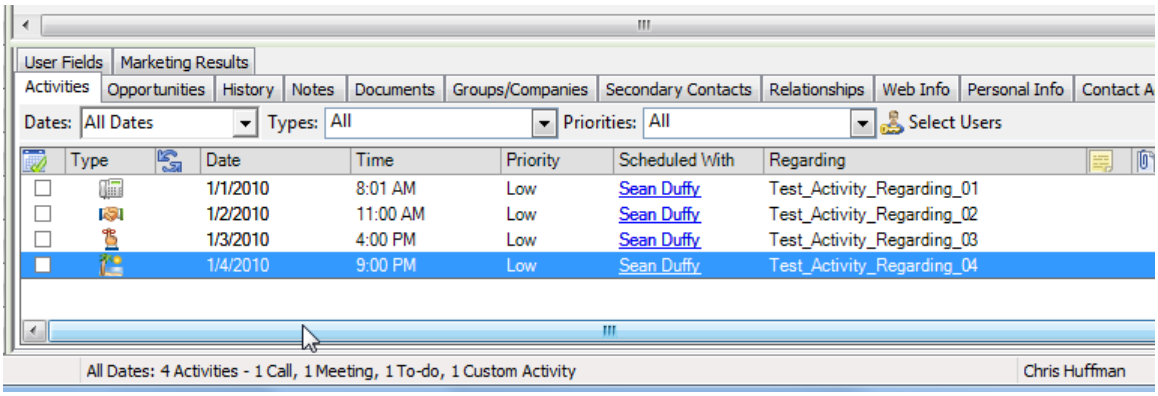


Results in Act! are on the Calendar, Task List, and Activities TAB.



TIP: All the above activities are "scheduled for" the user name used by OAK!Merge to log into the database. See below to specify different "Scheduled For" users.

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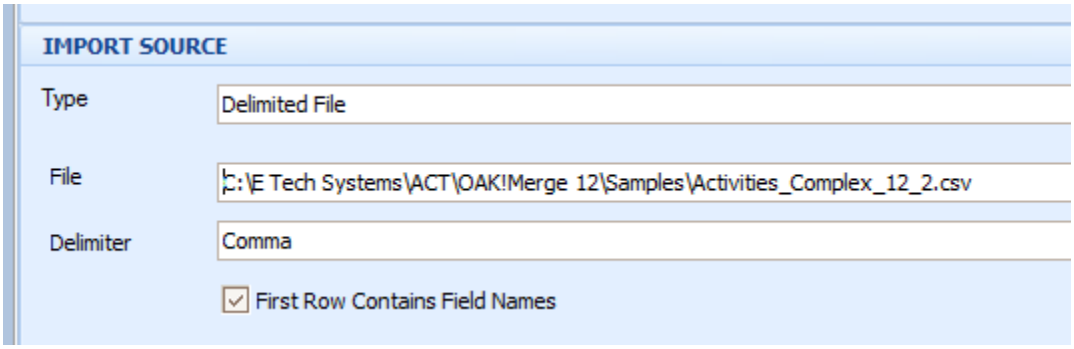
Example 12: Act! Activities Merge - Complex

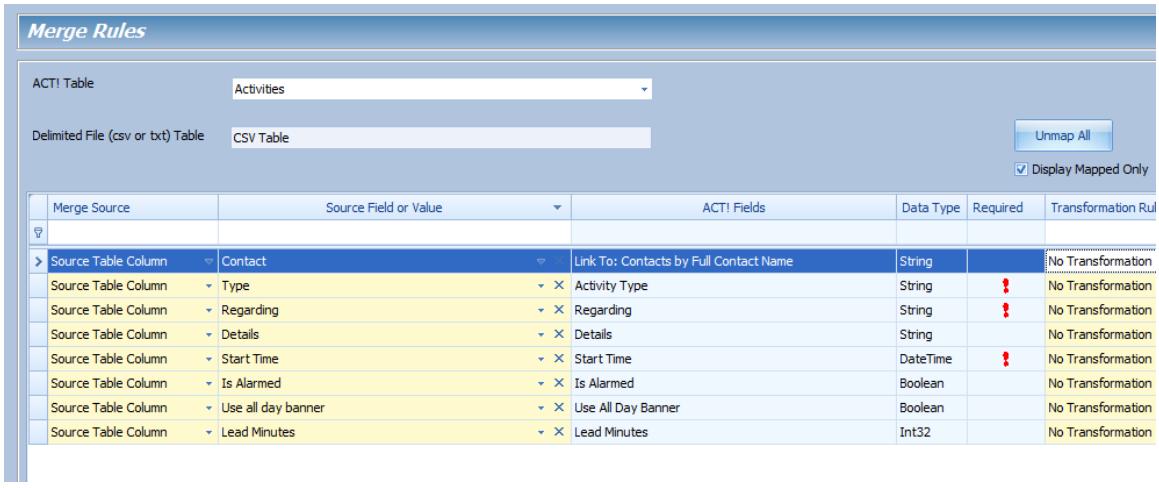
The sample file is Activities_Complex_12_2.csv

	A	B	C	D	E	F	G	H	I	J
1	Contact	Company	Type	Regarding	Start Time	End Time	Use all day ban	Lead Minutes	Is Alarmed	Details
2	Sean Duffy	Circle Photograp	Call	Test_Activity_Regarding_01	1/1/2010 8:01			30	Yes	This is a note
3	Sean Duffy	Circle Photograp	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	1/2/2010 14:00				Test 2
4	Sean Duffy	Circle Photograp	To-do	Test_Activity_Regarding_03	1/3/2010 16:00					
5	Sean Duffy	Circle Photograp	Vacation	Test_Activity_Regarding_04	1/4/2010 9:00	1/6/2010 9:00	Yes			Yahoo

Delimited File – Source



MAP as shown



Complete Run

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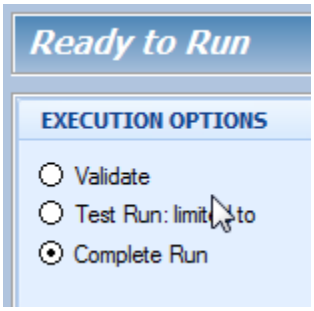
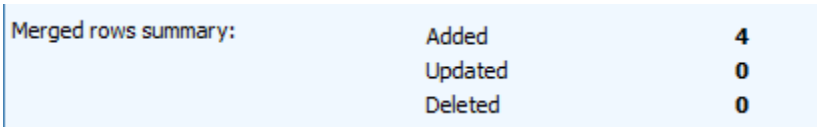
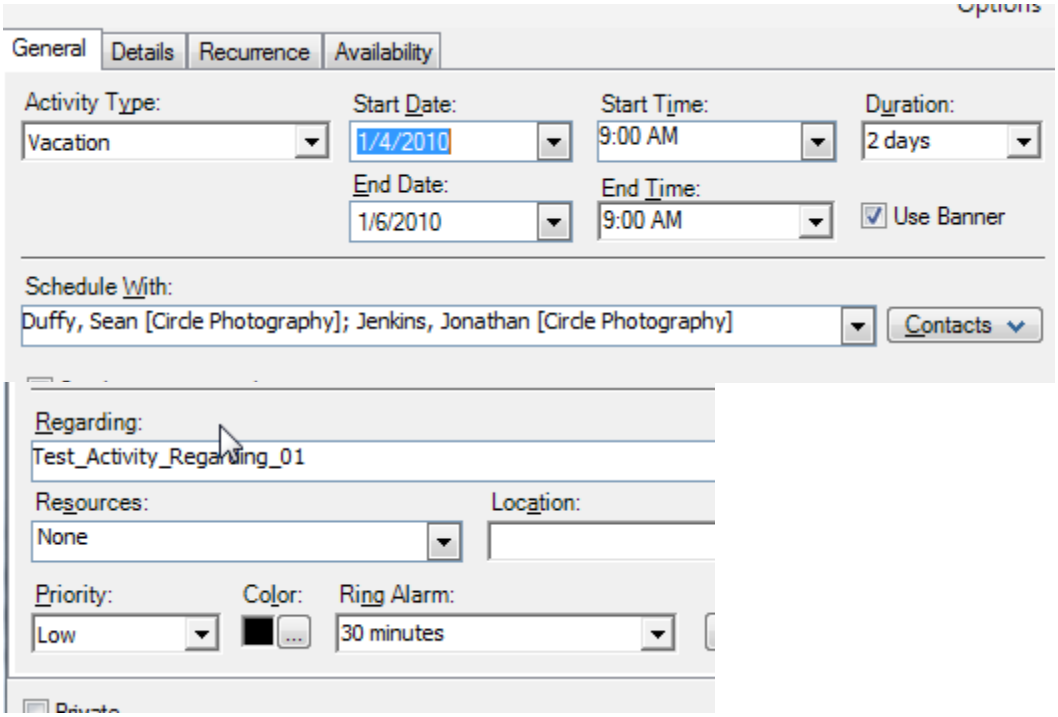




Using company will add the activity to all contacts at that company.



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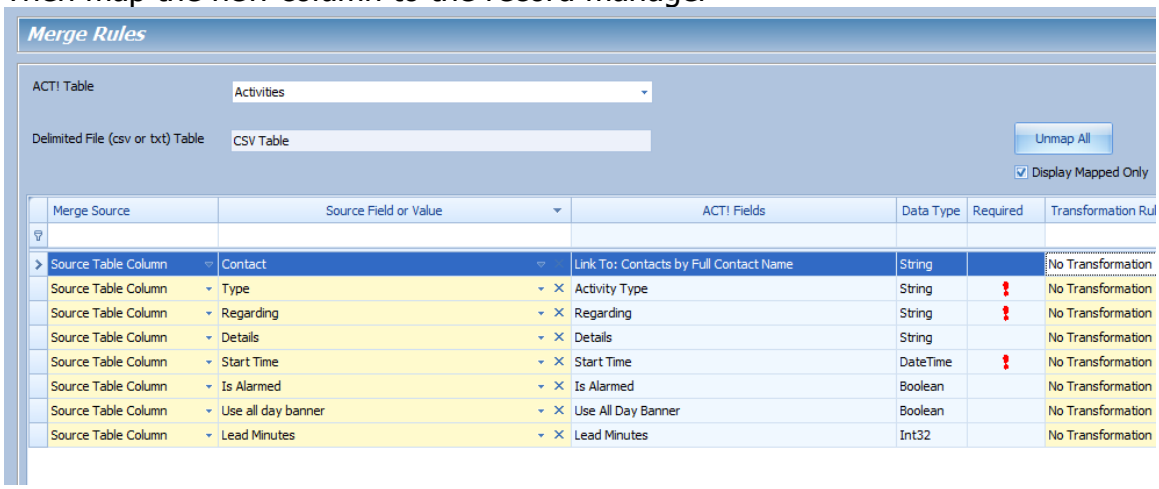
TIP: : You can schedule Act! Activities for various ACT Users.
Just map their user name to the Record Manager field in the mapping section
If no user (or an unknown user) is specified; then the user logged in to do the merge from screen one is used. See the tip below for more on the defaults
Steps:

Add the user's name you want the activities scheduled for in a column

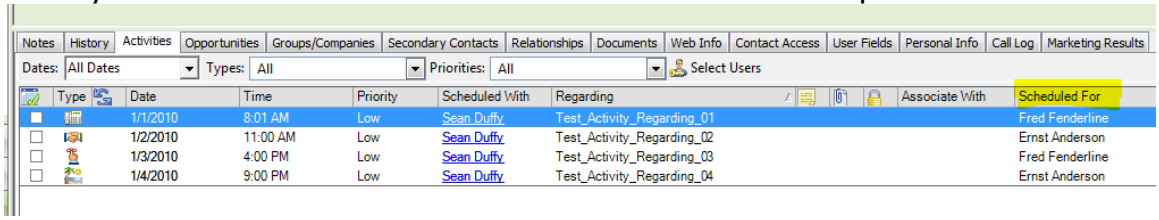
	A	B	C	D	E
1	Contact	Type	Regarding	Start Time	SCH_FOR
2	Sean Duffy	Call	Test_Activity_Regarding_01	1/1/2010 8:01	Fred Fenderline
3	Sean Duffy	Meeting	Test_Activity_Regarding_02	1/2/2010 11:00	Ernst Anderson
4	Sean Duffy	To-do	Test_Activity_Regarding_03	1/3/2010 16:00	Fred Fenderline
5	Sean Duffy	Vacation	Test_Activity_Regarding_04	1/4/2010 21:00	Ernst Anderson

Above file is in the samples folder: Activities_Simple_Plus_Users_14_5.csv

Then map the new column to the record manager



Gives you activities scheduled for different Act! users to complete



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TIP: Be careful mapping Scheduled With vs Scheduled For. Scheduled With is set via the LINK TO mapping whereas Scheduled For is set by mapping the record manager. They are both set to something for each activity.

For new activities the "scheduled with" is set to whatever the activity is LINKED to. It will be defaulted to the RECORD MANAGER if there is no LINK to data for a contact, company, group, or opportunity. If there is no data for RECORD MANAGER; then the "my record" of the user doing the OAKMerge import will be used for the Scheduled with.

For new activities the "scheduled for" is set to user mapped as Record Manager. If no record manager is mapped or the data is invalid, then the "scheduled for" is set to the Act! user doing the OAKMerge import.

OAK!Merge does not let you specify the Scheduled BY. It is always set to the Act! user doing the OAKMerge import.

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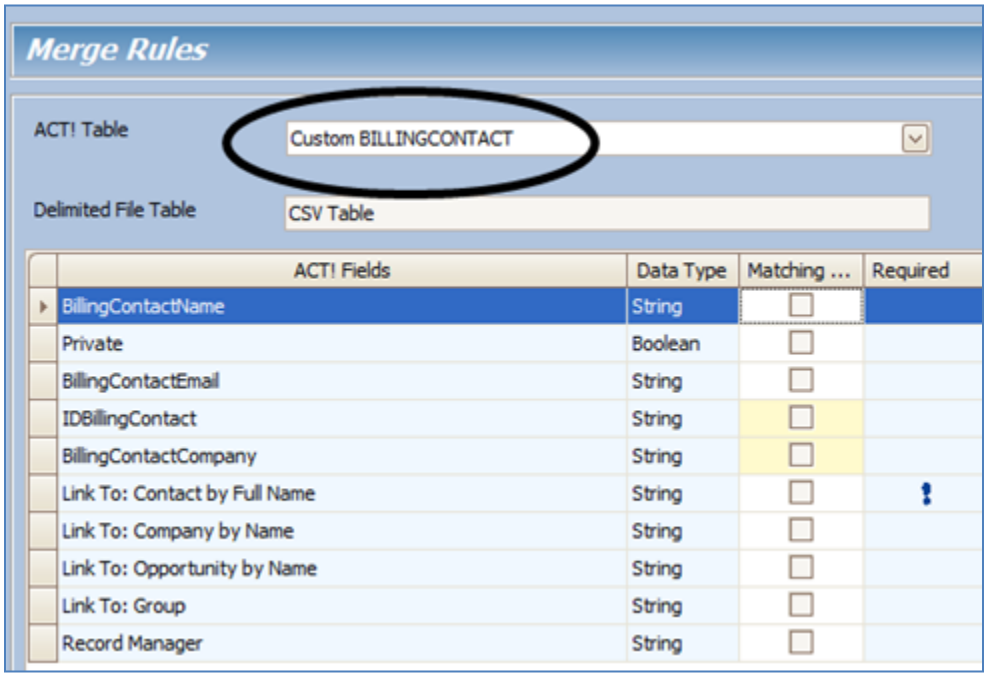
Example 13: Custom Table Merges

You can append or update records to ACT custom tables in ACT 12 or later just like Contacts or Companies. You pick what fields to match on; then select the execute options: What to do if the matches and what to do if it does not match.

All the custom tables in a database will be available as targets in the merges. The word custom appears in front of the table name.

You Link the custom table rows to Contacts, Companies, Groups, or opportunities using the "Link To:" Fields.



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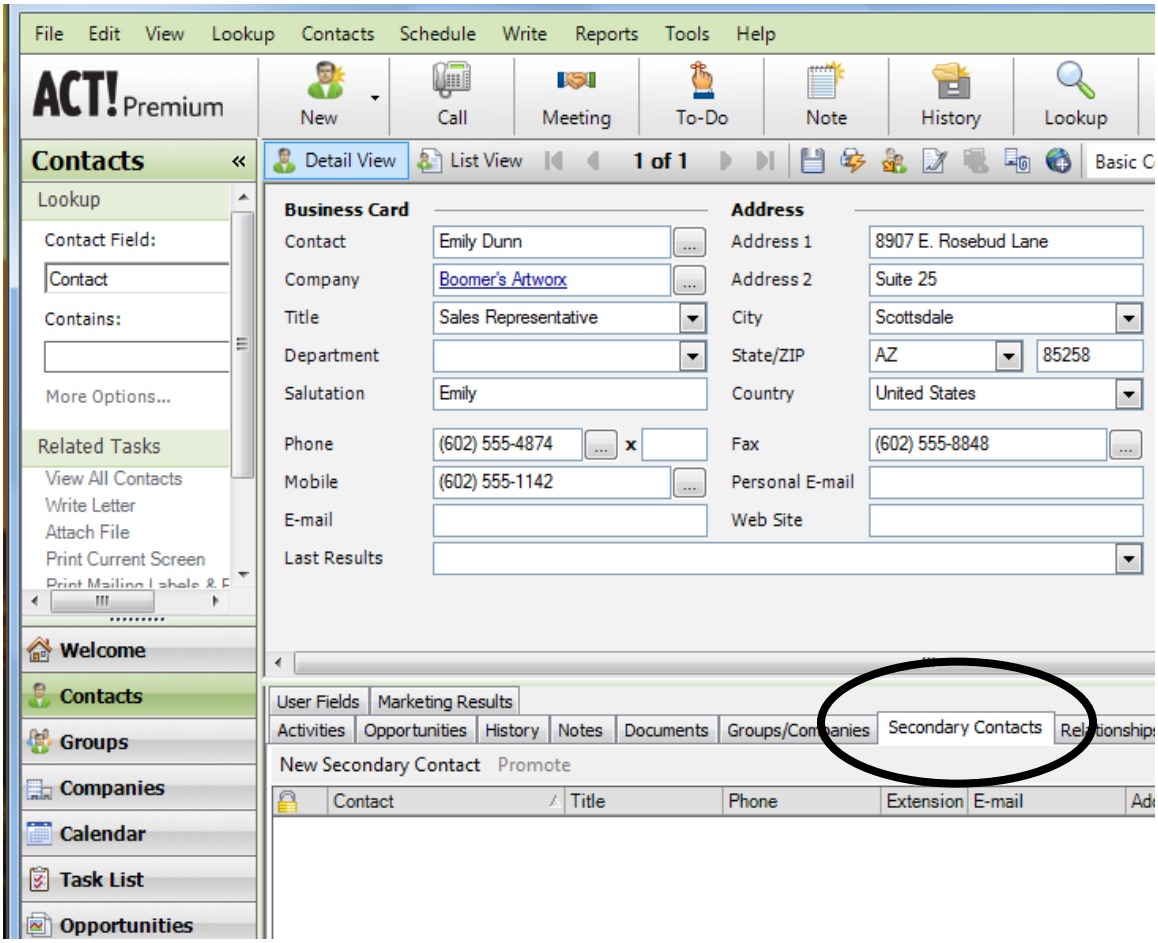
Example 14: Secondary Contact Merges

To add Contacts / data to the Secondary Contacts tab use the Pro version to merge to the secondary contacts table. You link to a primary contact and company using the Contact Name OR Contact Name PLUS Company. You cannot link secondary contacts to primary contacts based on other fields.



A sample file is in the **OAK!Merge** samples folder called: Secondary_Contacts_12.csv

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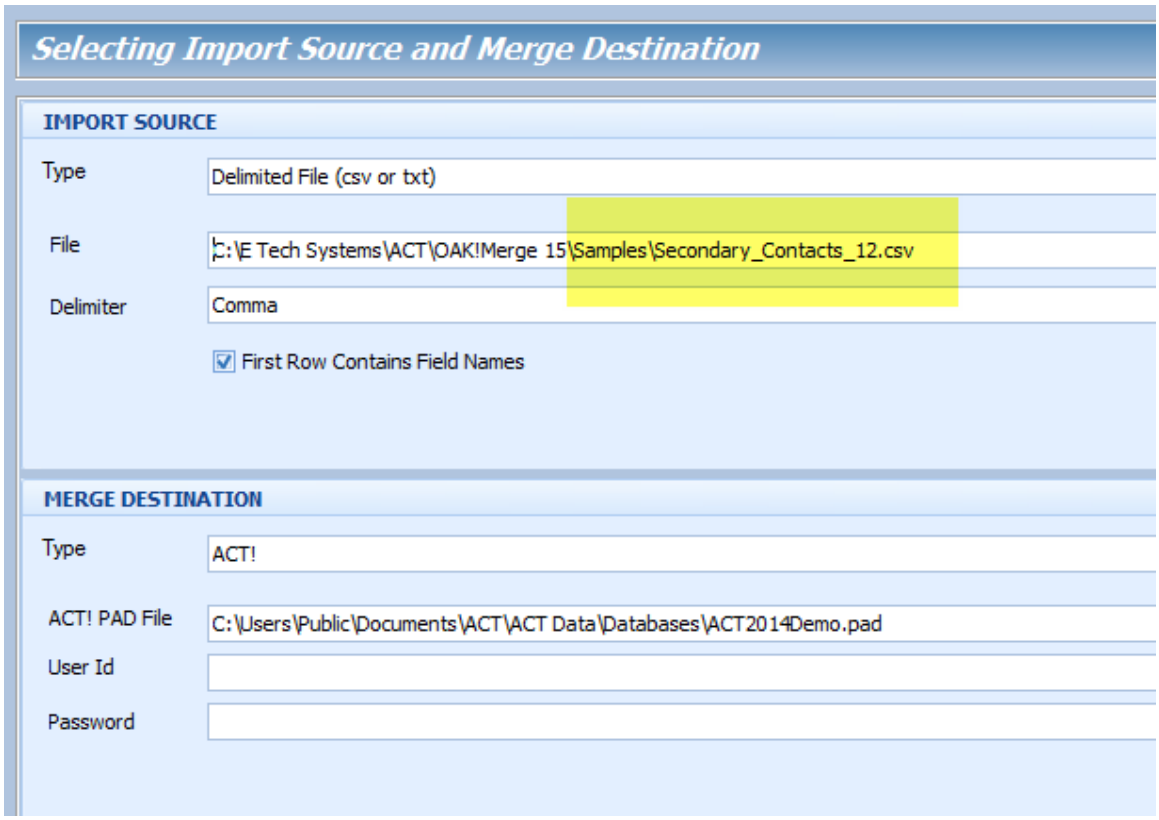
	A	B	C	D	E	F	G	H	I	J	K	L
1	Primary_Contact	Primary_Contact_Company_	Contact	Company	Phone	Title	Address Line 1	Address Line 2	City	State	ZIP	end
2	Emily Dunn	Boomer's Artworx	Jack Mert	IBM	(602) 555-	Sales Rep	8907 E. Rosebud	Suite 25	Atlanta	GA	22222	end
3	Emily Dunn	Boomer's Artworx	Linda Carl	GM		Sales Rep	8907 E. Rosebud	Suite 25	Detroit	MI	33333	end
4	Emily Dunn	Boomer's Artworx	Adam Poe									end
5	Emily Dunn	Boomer's Artworx	Joe Gladn	SIEMENS								end
6	Emily Dunn	Boomer's Artworx	Paul Shan	TOYOTA	310-622-1	QA Manag	2000 Santa Monica Frwy		Los Angel	CA	90029	end
7	Emily Dunn		Jimmy Gingerich									end
8	Bettie James	Boomer's Artworx	Heather B	CNN	310-622-1	501	4000 Santa Monica Frwy		Los Angel	CA	90029	end
9	Bettie James	Boomer's Artworx	Philip Lon	SEARS		Consultan	16 N. Deville Dr.	Suite 40	Tempe	AZ	85281	end
10	Bettie James	Boomer's Artworx	Tammy Dc	US PATEN	(310) 555-	Analyst	22 First Ave.		New York	NY	11111	end
11	Bettie James	Boomer's Artworx	Bill Griffin	Univ of XYZ							92109	end

Start a new merge and pick delimited file as import source and the Merge Destination as the **Act!** Demo database.



Select Secondary Contacts as the **Act!** table to merge to.

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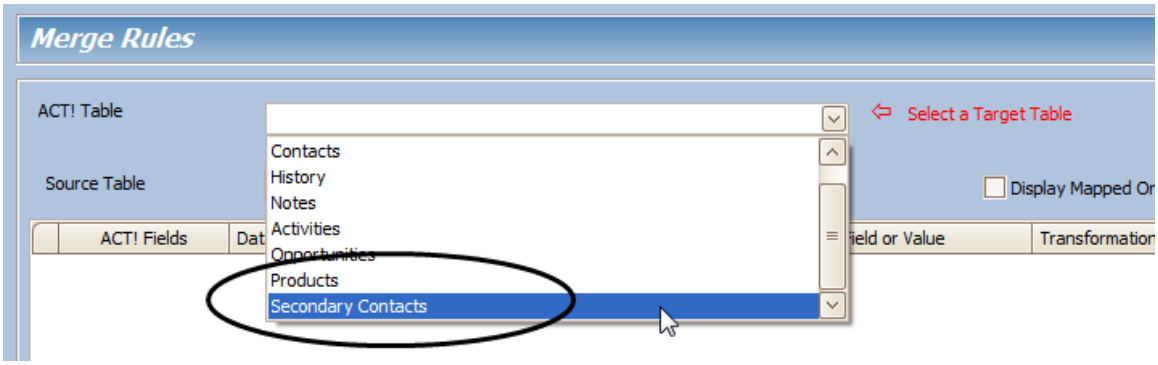
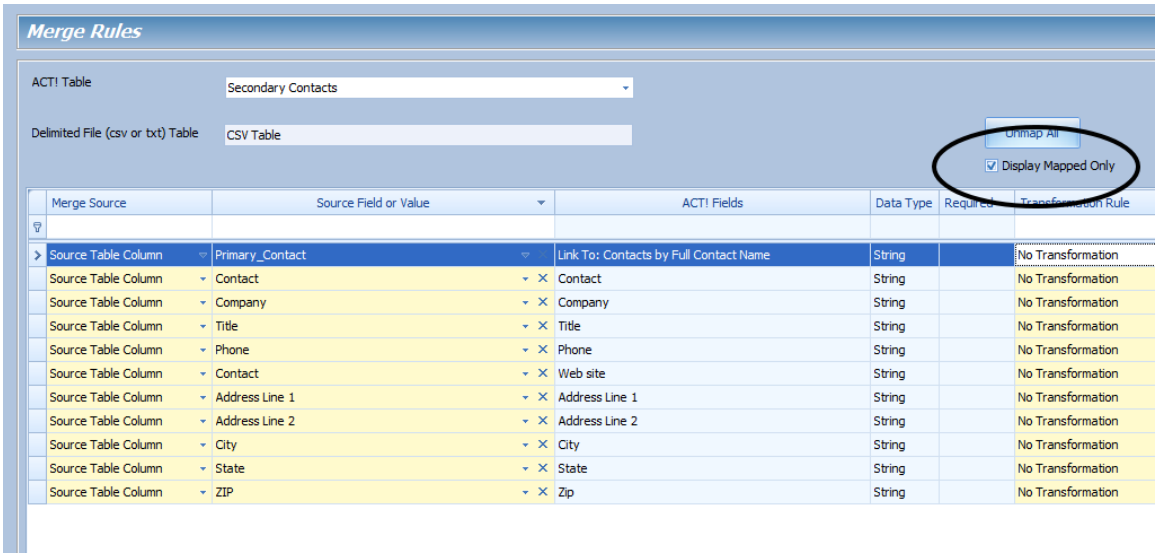


Check the "Display mapped only" box to condense list. The primary_company and end field does not need to be mapped.



Use complete Run to write the info. Validate / Preview does NOT write anything to **Act!**

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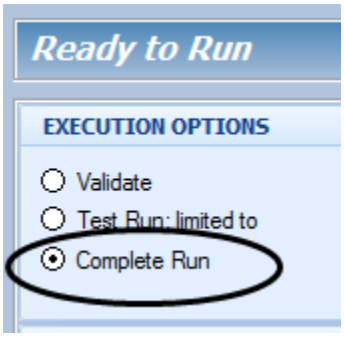
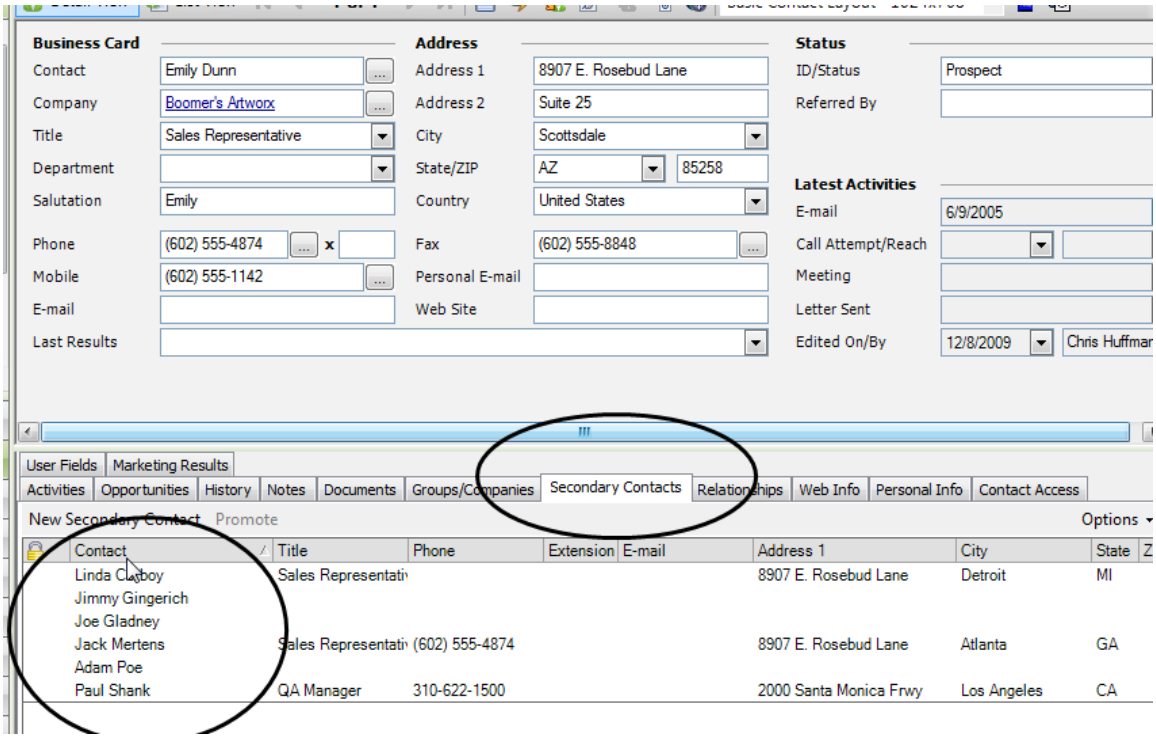


The results show edited, added and elapsed time.

The new secondary contacts show up on the Secondary contacts tab IF the Primary Contact exists. If no match is found for the Contact/Company the contact gets added to the **Act!** my record for the user doing the merge. If the Contact is blank, the row is skipped.



Example 15: Act! User Merges

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To add Act! users or transfer Act! users from one Act! data base to another use the Pro version of OAK!Merge. You can import a list of names to create the my records and Act! User accounts. Input fields include the Contact Name and User Name. Note the GUID is not transferred when doing an Act! to Act! merge. The user name can be used by OAK!Merge to set the record manager in other merges.

The sample file is User_12.csv

ContactName	Password	UserName	Role	Status
Jane Jones	Red	JJ	Administrator	Active
Tom Smith	Test	tSmith	Manager	Active
Cindy		Cindy	Standard	Active
Temp Employee	password	temp	Browse	Inactive
John Evans		JE		Inactive
Carl Jones		CJ		Inactive

Sample Merge of Users from a CSV

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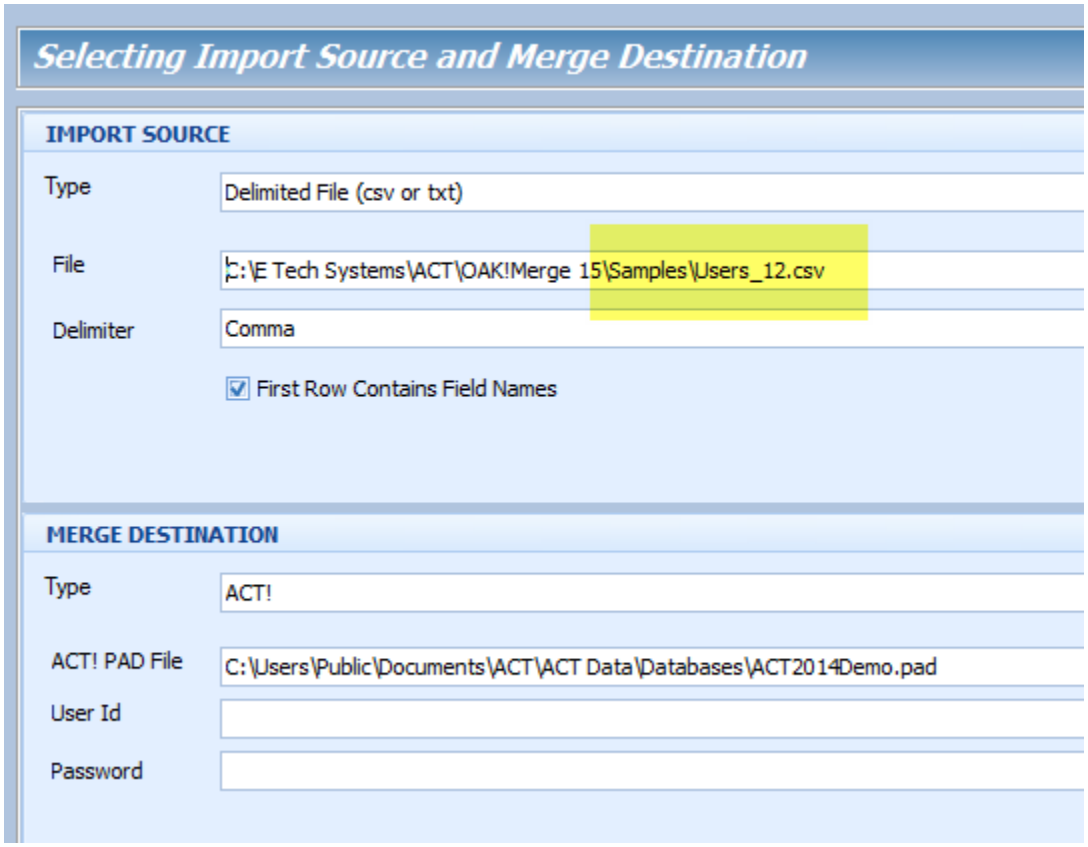
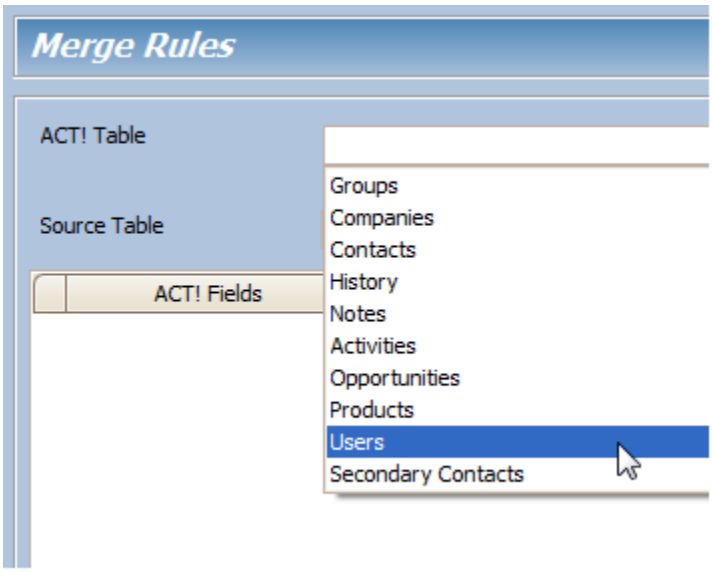


Users table is the target



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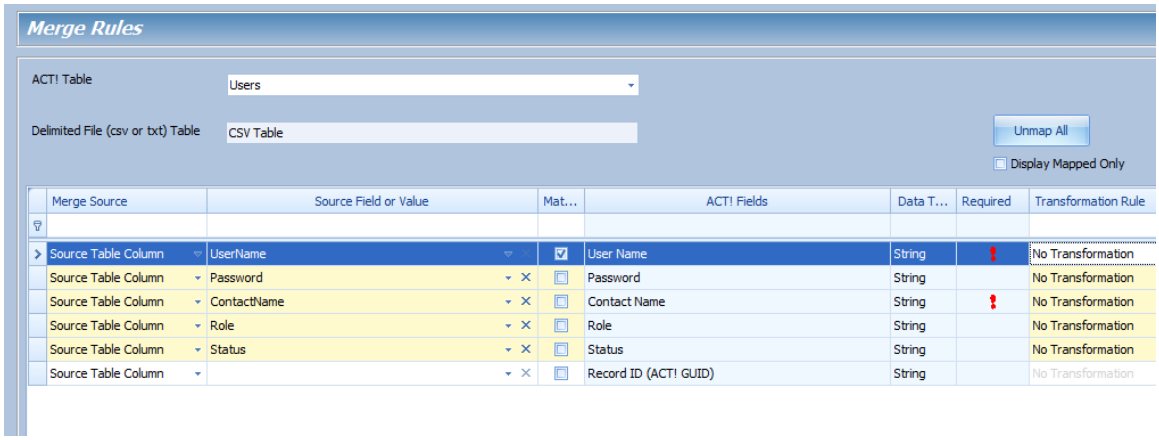
Mapping
You can select fields to match on if you need to update other fields



The Record ID (ACT GUID) is NOT updateable. You can use it to match on to find and update an existing User Record. Export the users to get the GUIDs.

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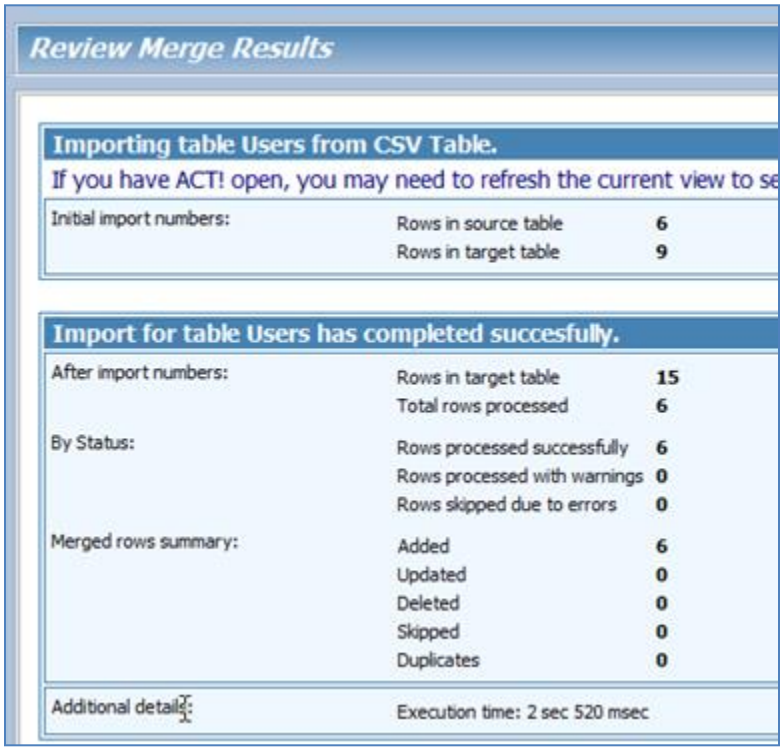
Review Merge Results
Importing table Users from CSV Table.
If you have ACT! open, you may need to refresh the current view to se
Initial import numbers:
Rows in source table 6
Rows in target table 9
Import for table Users has completed succesfully.
After import numbers:
Rows in target table 15
Total rows processed 6
By Status:
Rows processed successfully 6
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added 6
Updated 0
Deleted 0
Skipped 0
Duplicates 0
Additional details:
Execution time: 2 sec 520 msec

In ACT you get new contacts and user accounts

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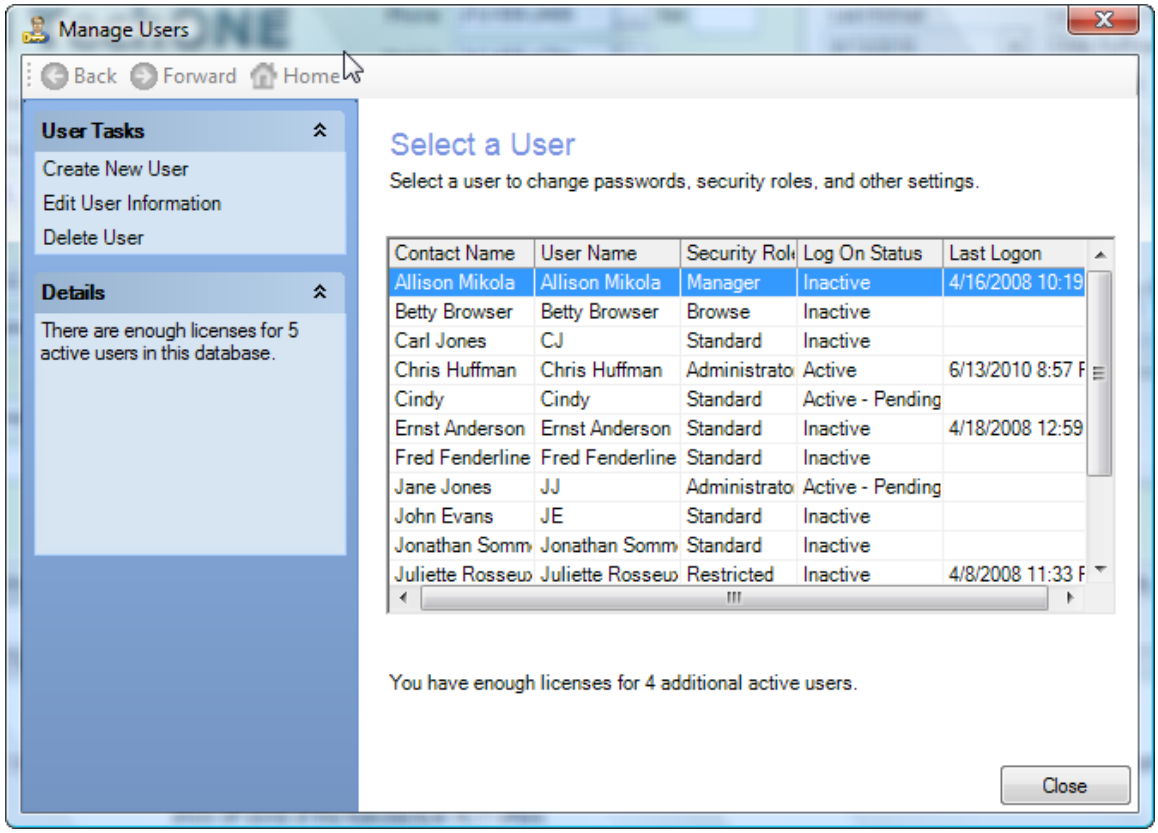

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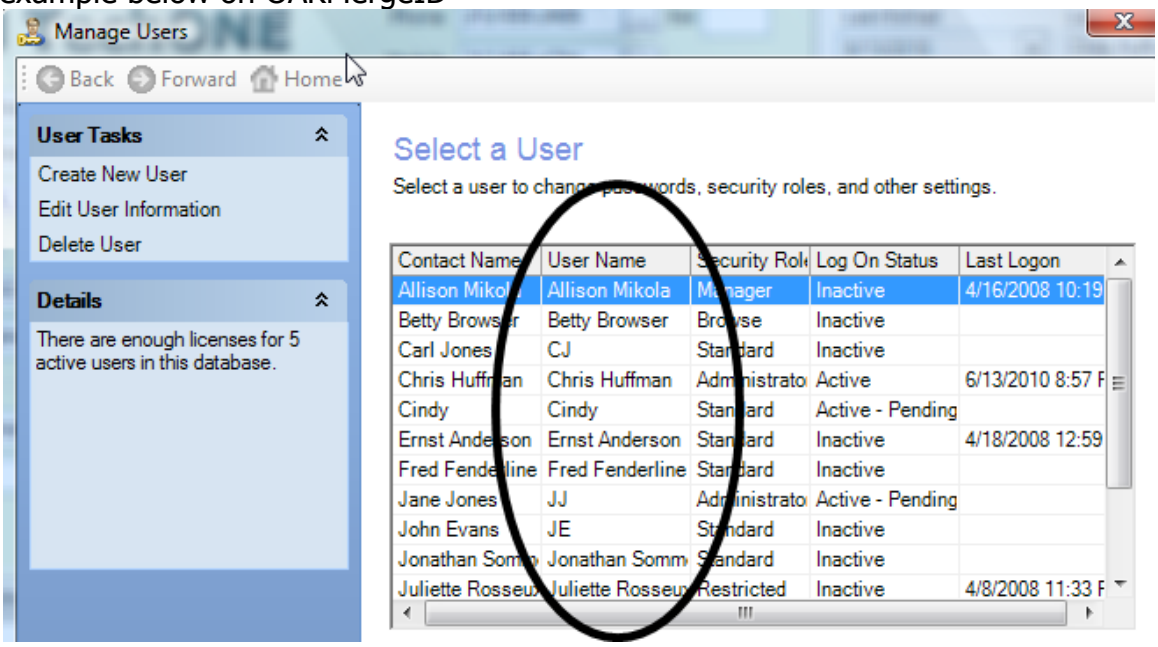
Example 16: Setting the record manager

All the editions of OAK!Merge (BASIC to PRO) versions 12.3.0 or later allow you to set the record manager. Use the User Name, not the contact name. See the example below on OAKMergeID



Example 17: Using the OAKMergeID field for linking History, Notes, etc.. to Contacts

OAK!Merge Version 12.4.0 and later supports linking history, notes, etc. to Contacts, Companies, and/or Opportunities via a special field instead of the Contact Name, Company Name, or Opportunity Name

Previous versions support Linking only by Contact Name, Company Name, or Opportunity Name. This is to link a history, note, activity record, or custom table record to a contact, company, or opportunity.

To use this feature, create a field called OAKMergeID as a text field. You can then populate it with any text or numbers you wish to use to link on. A typical example is a unique contact ID number you can put in each contact and the associated history records you wish to append and link.

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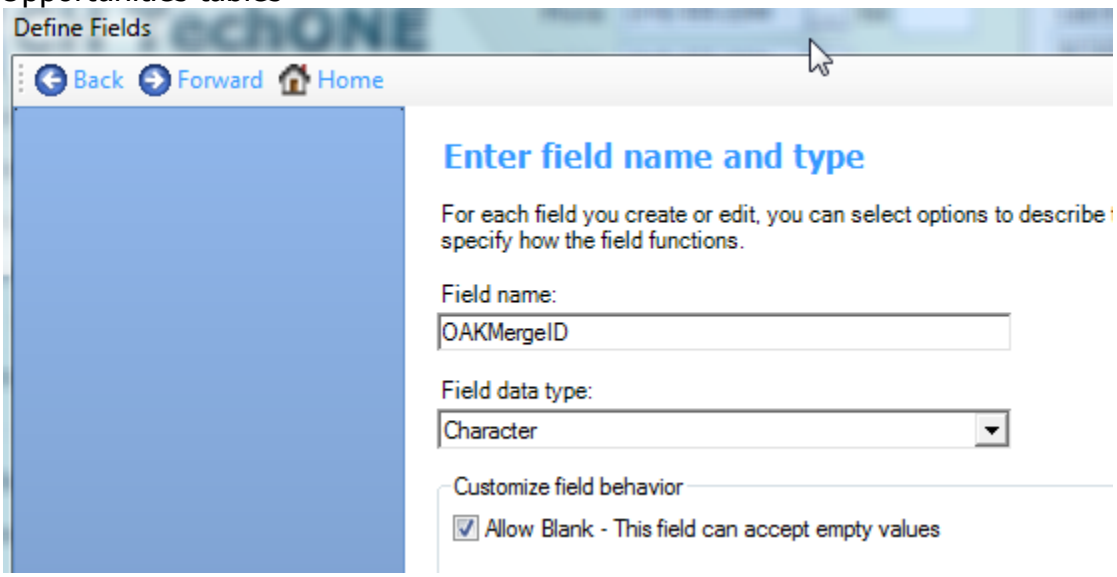
Use Tools, Define Fields in Act! to add the custom field OAKMergeID. You can create an OAKMergeID field in any or all of Companies, Contacts, or Opportunities tables



Step 1 Merge the Contacts with OAKMerge IDs 12 4.csv to populate the OAKMergeID

Company	Contact	Phone	Title	Address1	Address2	City	State	ZIP	OAKMergeID	YTD_SALE	AR Balanc	Credit Lim
Boomer's	Emily Dun	(602) 555-	Sales Rep	8907 E. Ro	Suite 25	Scottsdale	AZ	85258	A_0023	0		1000
Boomer's	Bettie James		Sales Rep	8907 E. Ro	Suite 25	Scottsdale	AZ	85258	A_0024	100	500	2000
Corleone'	Morty Mai	(480) 555-	Director o	8800 Past	Suite 200	Scottsdale	AZ	85258	A_0025	1000		5000
Duke Indu	Nathan Cu	310-622-1507		4075 Santa Monica Fi		Los Angel	CA	90029	A_0026	400000	20000	50000
Duke Indu	Marion M	310-622-1	Founder	4075 Santa Monica Fi		Los Angel	CA	90029	A_0027	500000		50000
Duke Indu	Kirby York	310-622-1506		4075 Santa Monica Fi		Los Angel	CA	90029	A_0028	600000		50000
Duke Indu	Ethan Edw	310-622-1501		4075 Santa Monica Fi		Los Angel	CA	90029	A_0029	700000		50000
Jake Flake	Bella Minoal		Consultan	1680 N. De	Suite 40	Tempe	AZ	85281	A_0030	800000		50000
Mad Hous	Greg Hart	(310) 555-	President	22 Acacia Ave.		Manhattai	CA	90266	A_0031	900000		50000
Yellow Jer	Ashley All	(619) 555-	VP of Sale	315 Cente	Suite 100	San Diego	CA	92109	ZZZ_ASHLEY	4000000	60000	2000000

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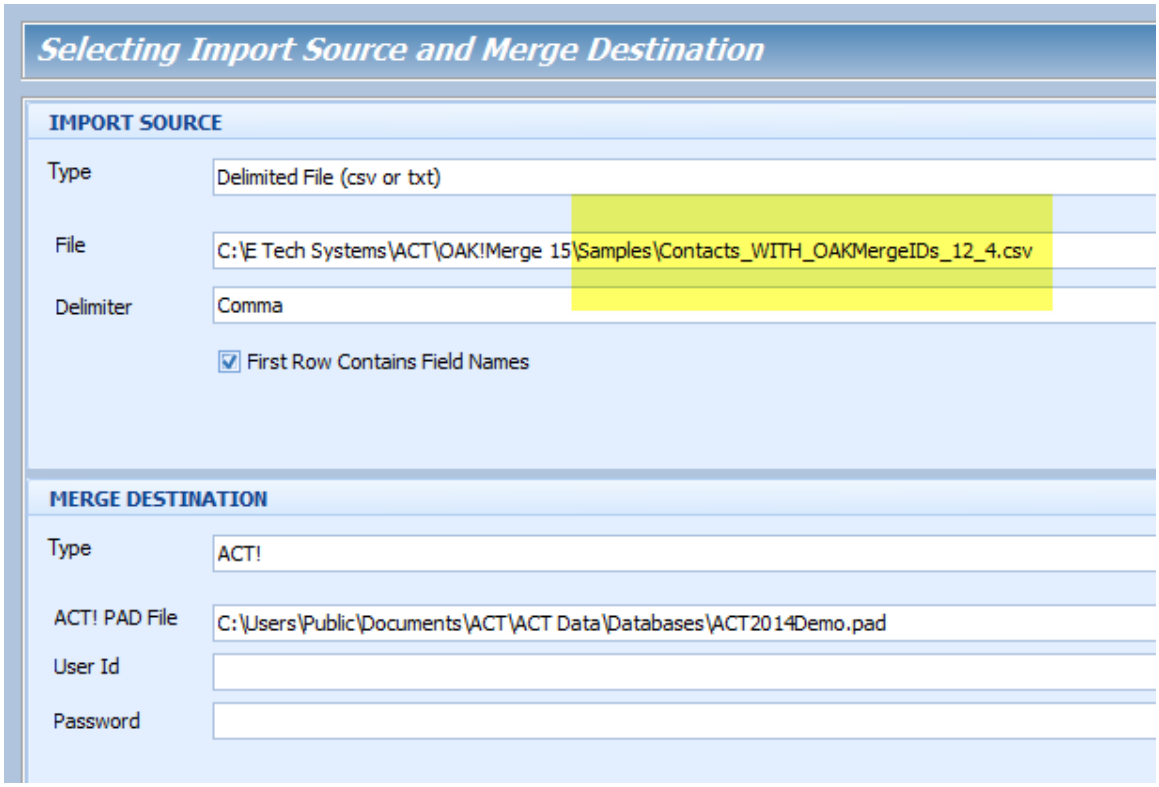

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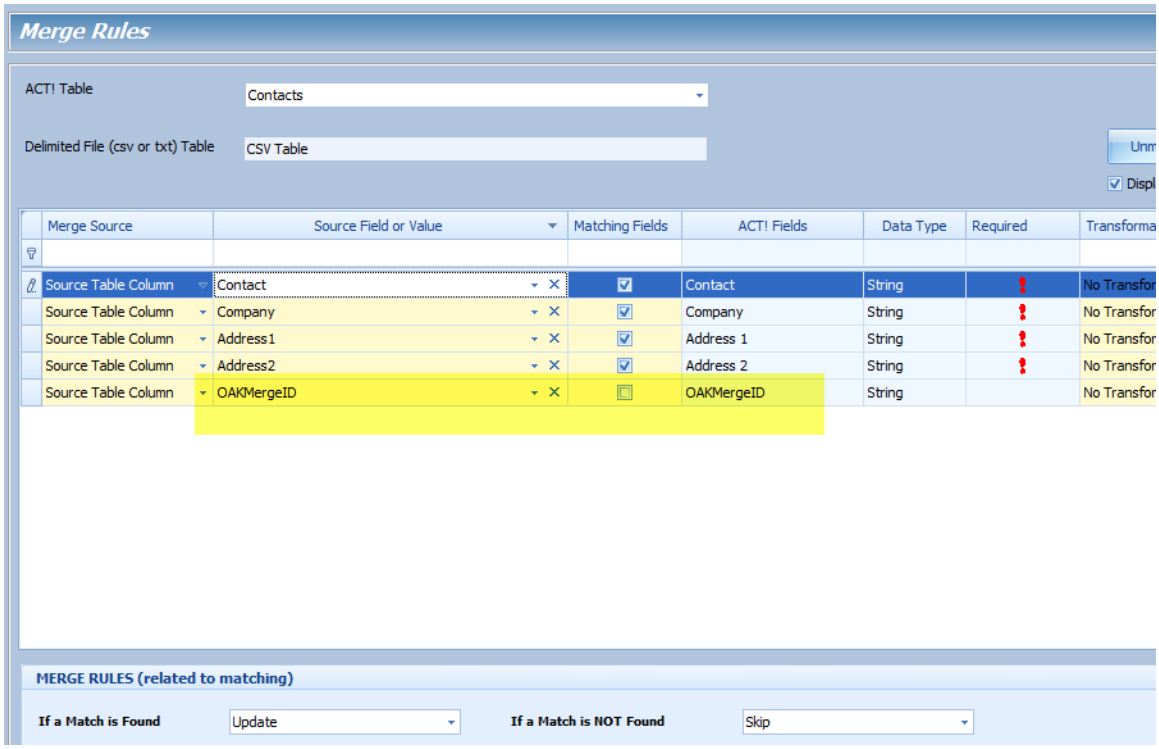
In this example we matched on 3 fields and updated only the OAKMergeID custom field to populate the OAKMergeID field in Contacts. That makes it available for Linking history, for example, to contacts.



Step 2: Merge the History linking on OAKMergeID
Use History_12_4_WITH_OAKMergeID csv Link on the OAKMergeID, not the company and contact

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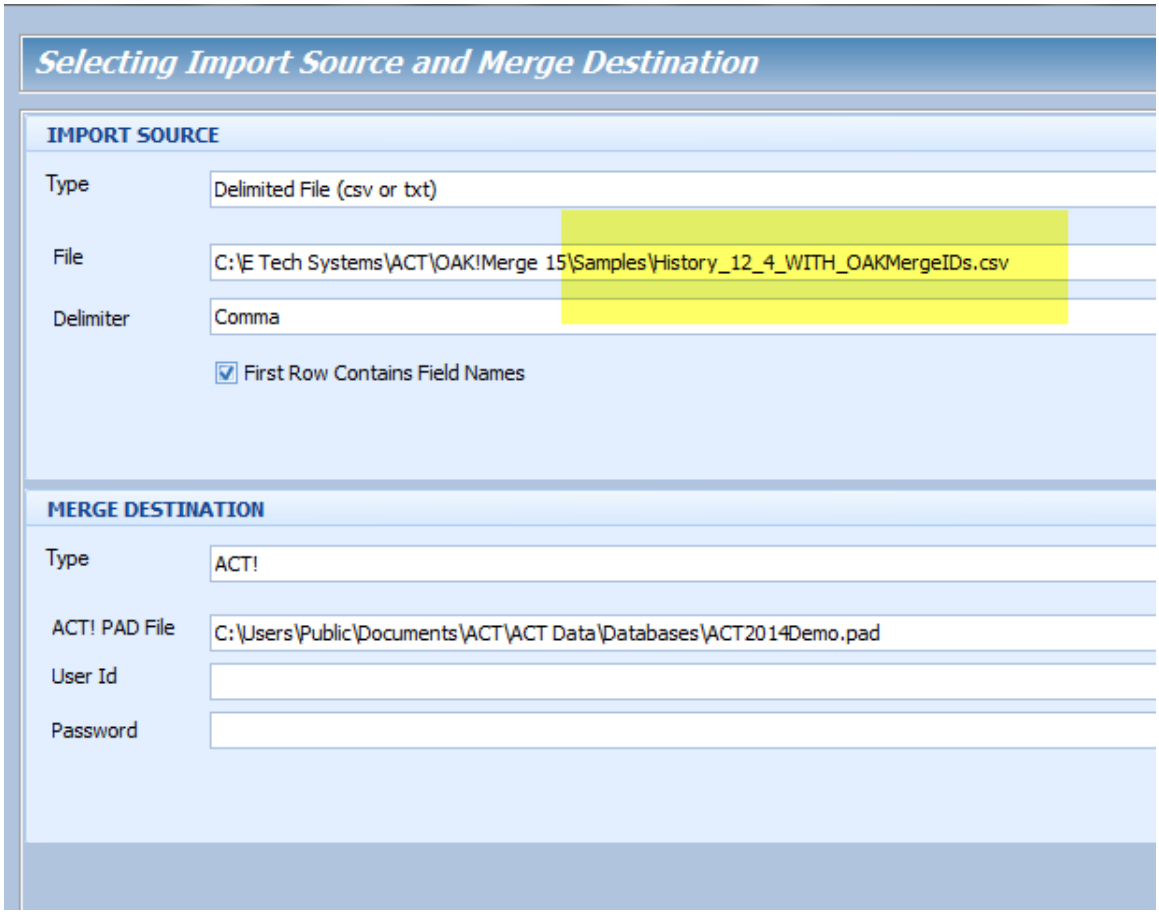

Company	Contact	TYPE	Start_Time	Regarding	Details	OAKMergeID	Record_Manager
Boomer's	Emily Dun	Attachment	7/1/2001	C:\E Tech	see attach	A_0023	Chris Huffman
Boomer's	Emily Dun	CallCompleted	7/2/2001	Phone cal	Windy	A_0023	Ernst Anderson
Boomer's	Emily Dun	CallCompleted	7/3/2001	Phone cal	Regional	A_0023	Ernst Anderson
Yellow Jer	Ashley All	CallCompleted	7/4/2001	Called and left a me		ZZZ_ASHLEY	Ernst Anderson
Yellow Jer	Ashley All	MeetingHeld	7/5/2001	Met a Hilt	Ashley, Jo	ZZZ_ASHLEY	Betty Browser
Yellow Jer	Ashley All	ToDoDone	7/6/2001	Sent prop	Quoted ne	ZZZ_ASHLEY	Betty Browser

Mapping: Link to Contacts by OAKMergeID

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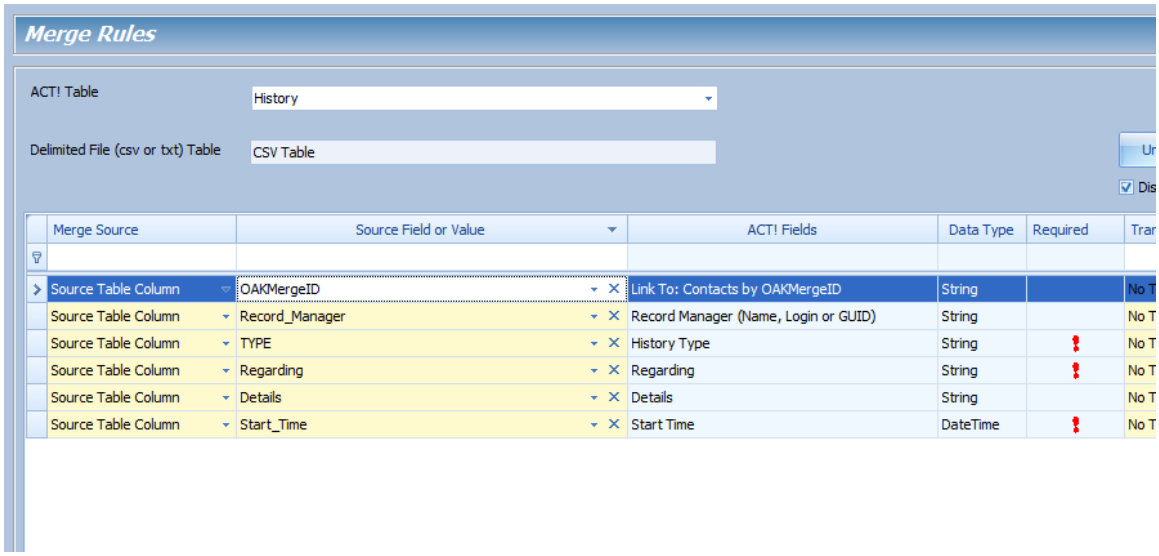

Results in ACT are:

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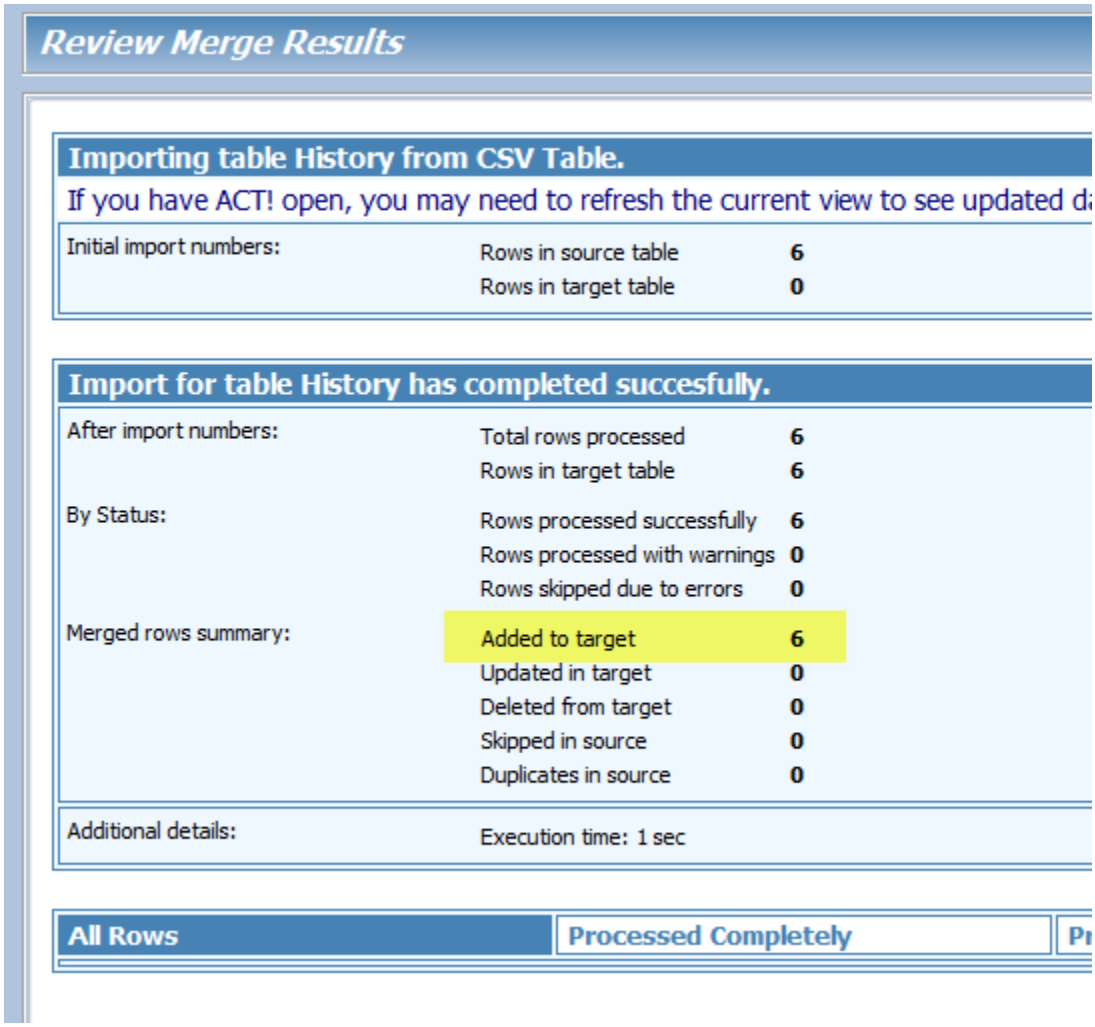
Review Merge Results
Importing table History from CSV Table.
If you have ACT! open, you may need to refresh the current view to see updated da
Initial import numbers:
Rows in source table 6
Rows in target table 0
Import for table History has completed succesfully.
After import numbers:
Total rows processed 6
Rows in target table 6
By Status:
Rows processed successfully 6
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added to target 6
Updated in target 0
Deleted from target 0
Skipped in source 0
Duplicates in source 0
Additional details:
Execution time: 1 sec
All Rows
Processed Completely
Pr

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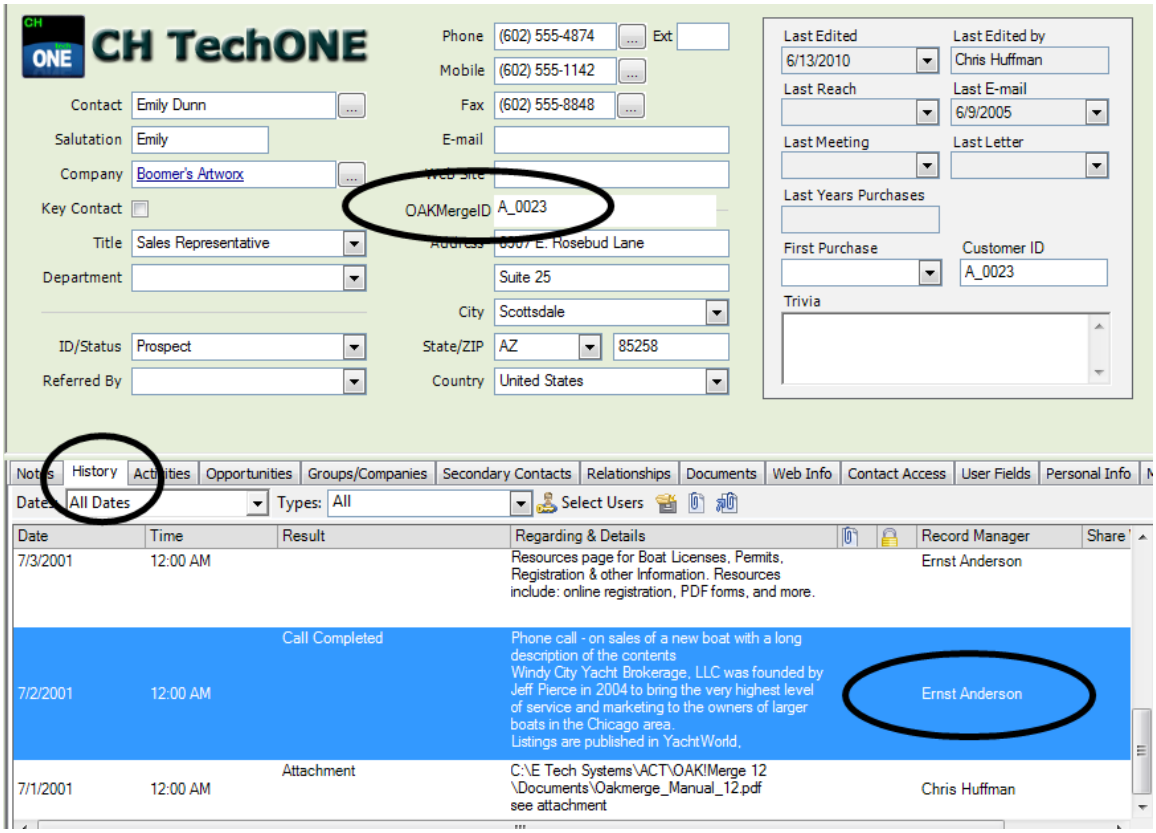
CH TechONE
Contact Emily Dunn
Salutation Emily
Company Boomer's Artworx
Key Contact
Title Sales Representative
Department
ID/Status Prospect
Referred By
Phone (602) 555-4874 Ext
Mobile (602) 555-1142
Fax (602) 555-8848
E-mail
OAKMergeID A_0023
Suite 25
City Scottsdale
State/ZIP AZ 85258
Country United States
Last Edited 6/13/2010
Last Edited by Chris Huffman
Last Reach
Last E-mail 6/9/2005
Last Meeting
Last Letter
Last Years Purchases
First Purchase
Customer ID A_0023
Trivia
History
Opportunities
Groups/Companies
Secondary Contacts
Relationships
Documents
Web Info
Contact Access
User Fields
Personal Info
Dates All Dates
Types: All
Select Users
Date Time Result Regarding & Details Record Manager
7/3/2001 12:00 AM Resources page for Boat Licenses, Permits, Registration & other Information. Resources include: online registration, PDF forms, and more. Ernst Anderson
7/2/2001 12:00 AM Call Completed Phone call - on sales of a new boat with a long description of the contents Windy City Yacht Brokerage, LLC was founded by Jeff Pierce in 2004 to bring the very highest level of service and marketing to the owners of larger boats in the Chicago area. Listings are published in YachtWorld, Ernst Anderson
7/1/2001 12:00 AM Attachment C:\E Tech Systems\ACT\OAK!Merge 12 \Documents\Oakmerge_Manual_12.pdf see attachment Chris Huffman

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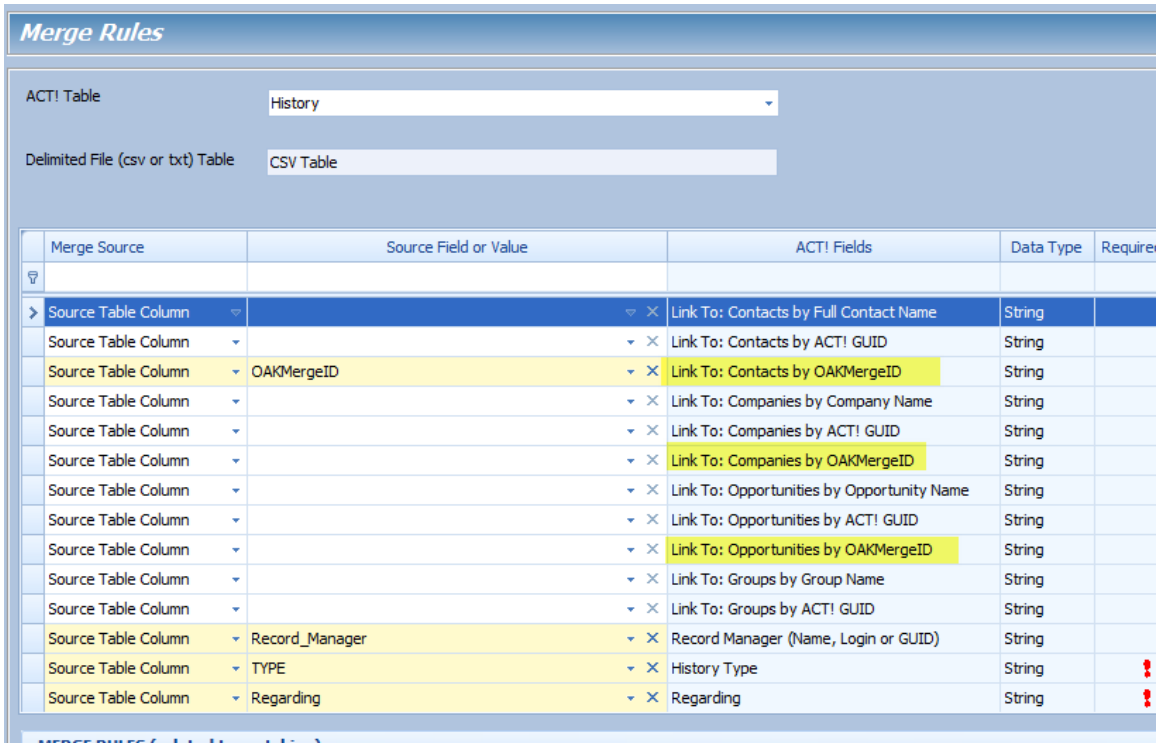
Using OAKMergeID will work for Contacts, Companies, Opportunities and/or Custom tables. If you create an OAKMergeID field in all three, it would look like this on a table merge:



Merge Source	Source Field or Value	ACT! Fields	Data Type	Require
Source Table Column		Link To: Contacts by Full Contact Name	String	
Source Table Column		Link To: Contacts by ACT! GUID	String	
Source Table Column	OAKMergeID	Link To: Contacts by OAKMergeID	String	
Source Table Column		Link To: Companies by Company Name	String	
Source Table Column		Link To: Companies by ACT! GUID	String	
Source Table Column		Link To: Companies by OAKMergeID	String	
Source Table Column		Link To: Opportunities by Opportunity Name	String	
Source Table Column		Link To: Opportunities by ACT! GUID	String	
Source Table Column		Link To: Opportunities by OAKMergeID	String	
Source Table Column		Link To: Groups by Group Name	String	
Source Table Column		Link To: Groups by ACT! GUID	String	
Source Table Column	Record_Manager	Record Manager (Name, Login or GUID)	String	
Source Table Column	TYPE	History Type	String	!
Source Table Column	Regarding	Regarding	String	!

Above is for LINKING the rows in a History table to Contact, Company, or Opportunity.

This LINKING method is often used to associate History with contacts, but you do not need to also link to Companies. History at the contact level is rolled up to the company level in Act!

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The same screen if there are NO OAKMergeID fields in the database would not contain the Link using OAKMergeID options

Group records does not support the OAKMergeID linking field.

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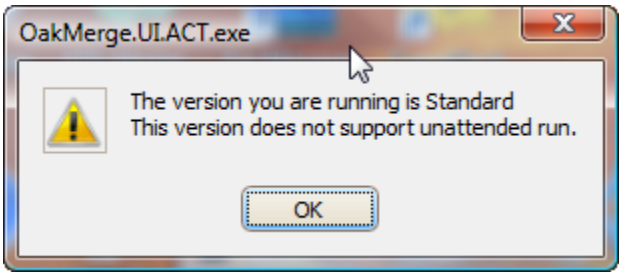
Example 18: Running in Unattended Mode (On a Schedule) (Run Automatically from Windows scheduler or another program)

OAK!Merge can be run automatically from a scheduler program or command line. A scheduler program is not included in OAK!Merge, but a free scheduler is included in Microsoft operating systems. For example, in XP it is in Accessories, System Tools and is called "Scheduled Tasks". In Windows 7 it is the "Task Scheduler"

This feature requires the Advanced version or higher of OAK!Merge

If you try to run from another version you will get this error:



First run your merge from inside **OAK!Merge** and save it as a Profile. Then you can repeat it from a batch file, command line or scheduler.

Format for command line is <path> *OakMerge.UI.ACT* <profile name> (optional logging level switch)

Example to run 3 in a row:

"C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batchONE

"C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batch2

"C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batch3

Steps:

1. Create, Save and test a Profile in **OAK!Merge**. Note the name of the profile.
2. Edit and test your command line using a DOS BATCH file like the RUN_OAKmerge.bat file. A sample command line is

   "C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batch44
3. Set your scheduler to run using the same command line you tested in the Run_OAKmerge.bat file.

   It can then run on your desired schedule.

TIP: : use profile names with no spaces or enclose them in quotes.

Merge from QB

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would not work but Merge_from_QB or "Merge from QB" would.

The Logging Level Switch is optional. The default level is "Full". The default level will be used either when no level is specified or invalid level is specified.

The possible values are:

```
None              (or "0")      for "No Logging"
Errors            (or "1")      for "Errors Only"
ErrorsWarnings    (or "2")      for "Errors and Warnings"
Full              (or "3")      for "Full Logging"
```

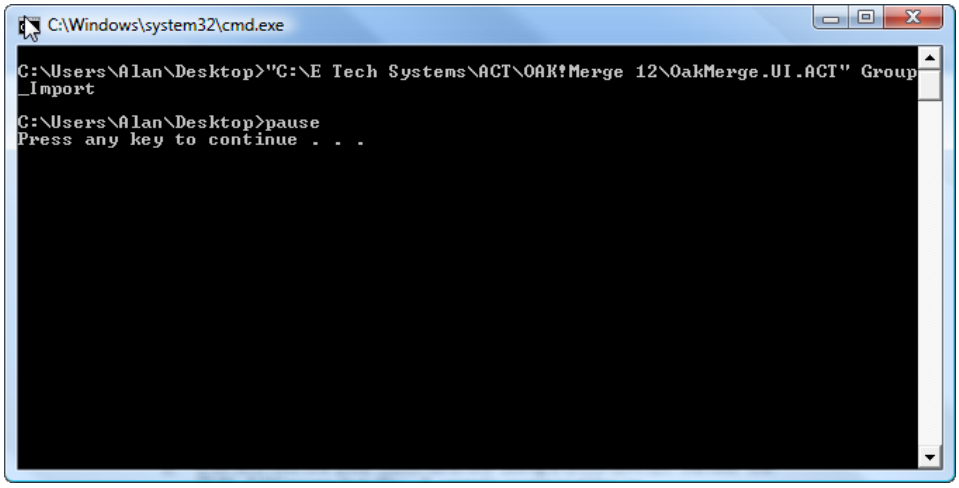
A sample command line for errors only is

"C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batch44 1

Or

"C:\E Tech Systems\ACT\OAK!Merge 13\OakMerge.UI.ACT" batch44 Errors

TIP: : For testing the BAT file, right mouse click to edit it and add a second line "pause". This will allow you see it run and debug it if you have errors. See example below.



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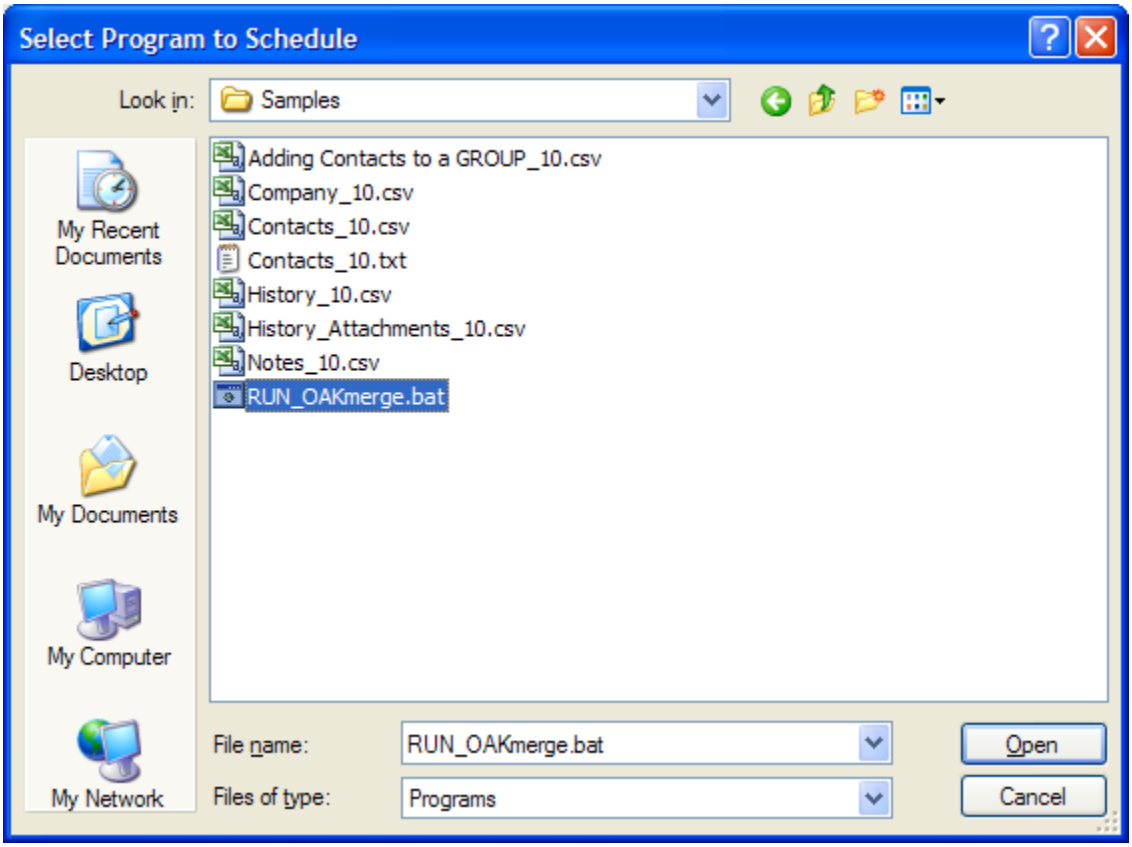

Sample Run_OAKmerge.bat with Remarks to display as it runs rem batch file to run a merge from a stored profile in **OAK!Merge**

"C:\E Tech Systems\ACT\OAK!Merge 17\OakMerge.UI.ACT" batch44

rem "All Done- log files with results are in C:\E Tech Systems\OAK!Merge 17\Logs"

rem

rem remove the pause below to run unattended from a scheduler

Pause

TIP: : to see what the unattended merges have been doing, check the Logs file.

To monitor what happened on unattended merges, open the merge report file in the logs folder. Each merge creates a log file ending in ".htm" with the results of the merge. The default location is C:\E Tech Systems\ACT\OAK!Merge 17\Logs Just double click on it to view it.

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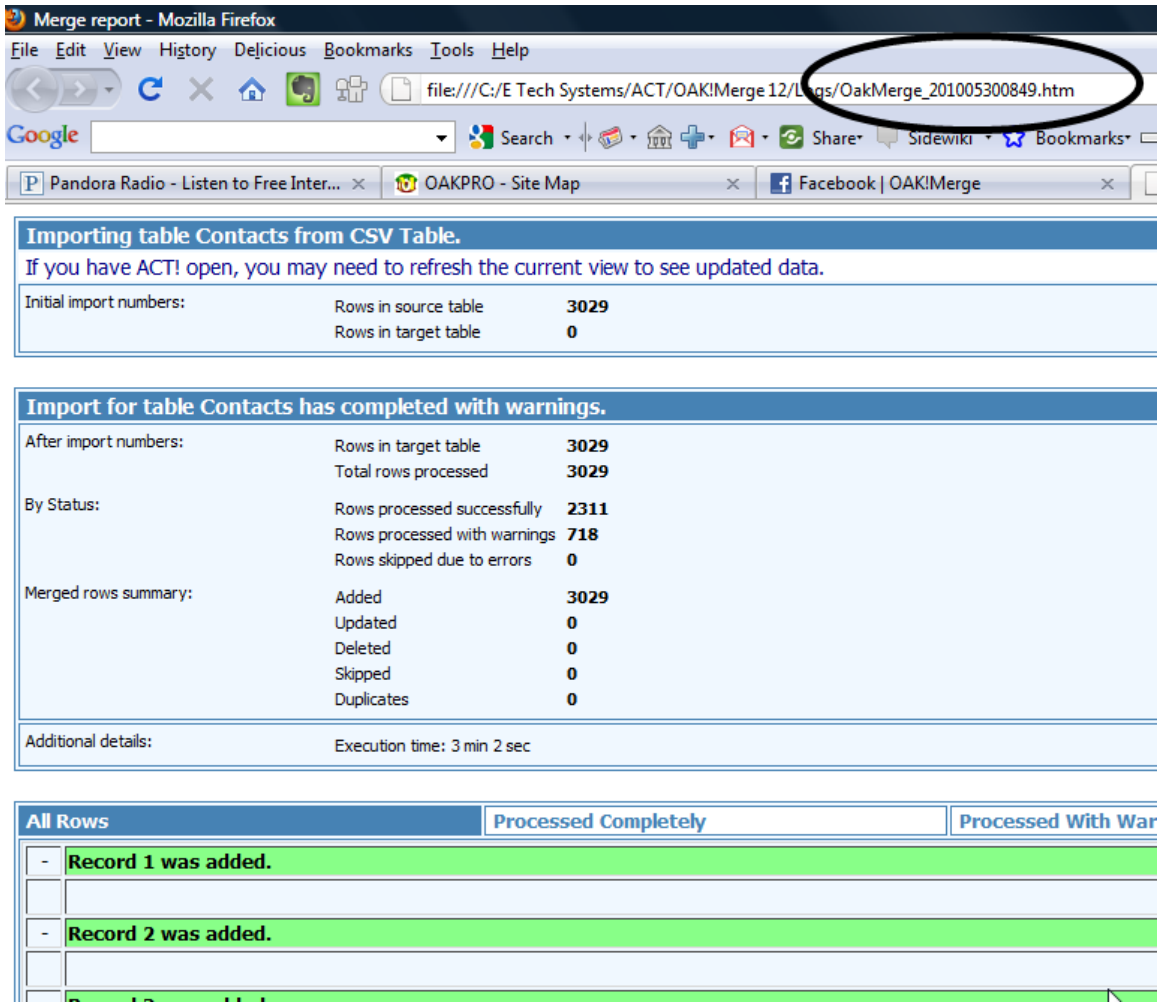
Example Merge Report



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Example 19: Act! to Act! Merges

You can merge some the tables from an **Act!** database to another **Act!** database in the Pro version. Both **Act!** databases must be same version as the installed version of **Act!** where **OAK!Merge** is installed. You can merge or append one table at a time. For example,

Contacts to Contacts or
Companies to Companies.
Contacts to Companies
Groups to Opportunities
Custom table to Custom table
Users to Users
Products to Products (but not custom product fields)
Append Notes and link them to other tables
Append History and link them to other tables
Append Activities and link them to other tables

One interesting merge is to DELETE all the contacts, companies, groups, opportunities, or rows in custom tables in the target Act! database if they match the source. This deletes all the records that match any duplicates.

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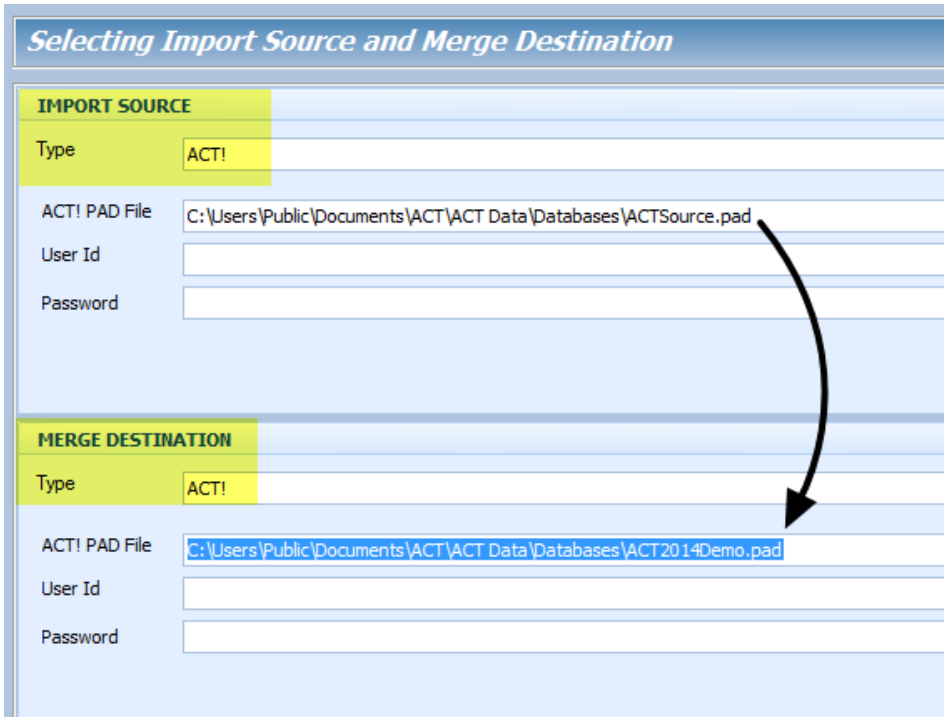
Select ACT as the Type for both Merge Destination (also called the target) and ACT as the Import Source



TIP: : You can also make the source and target the same database to merge Groups to Opportunities for example

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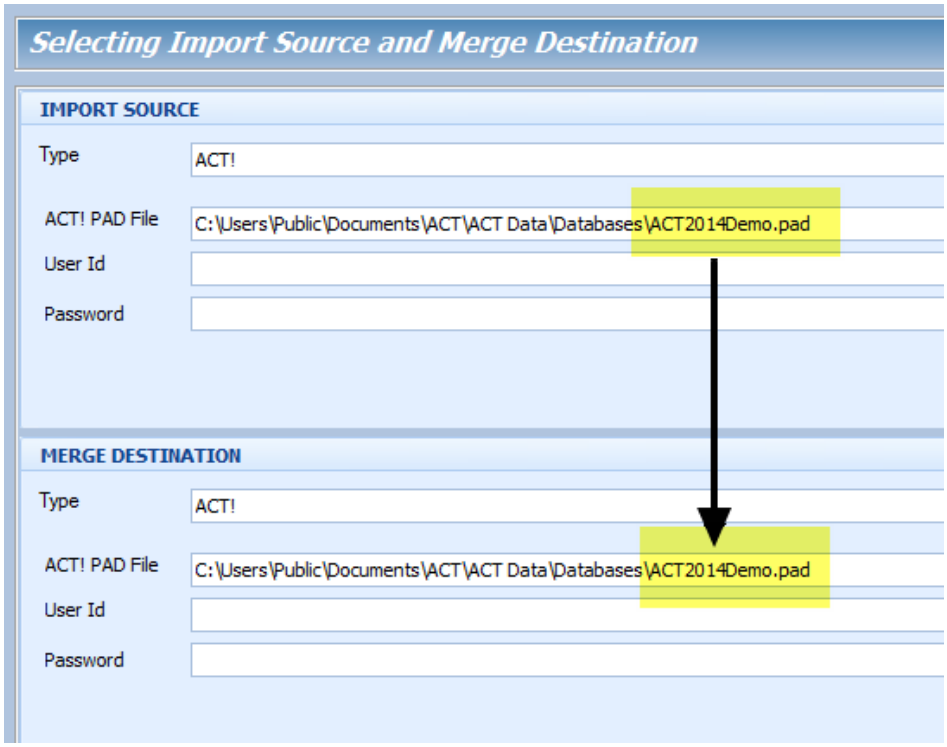

Tip: : You need to be able to open both **Act!** databases in **Act!** on the same PC where **OAK!Merge** is installed. Both Act! databases must be same version as the installed version of **Act!**

You then pick the table for source and target. Normally it is the same in ACT to ACT merges, but you can do cross table merges to change groups into opportunities for example.

You can only merge from/to Contacts, Companies, Groups, Products and Opportunities. Plus History, Notes, or Activities was added in 17.2

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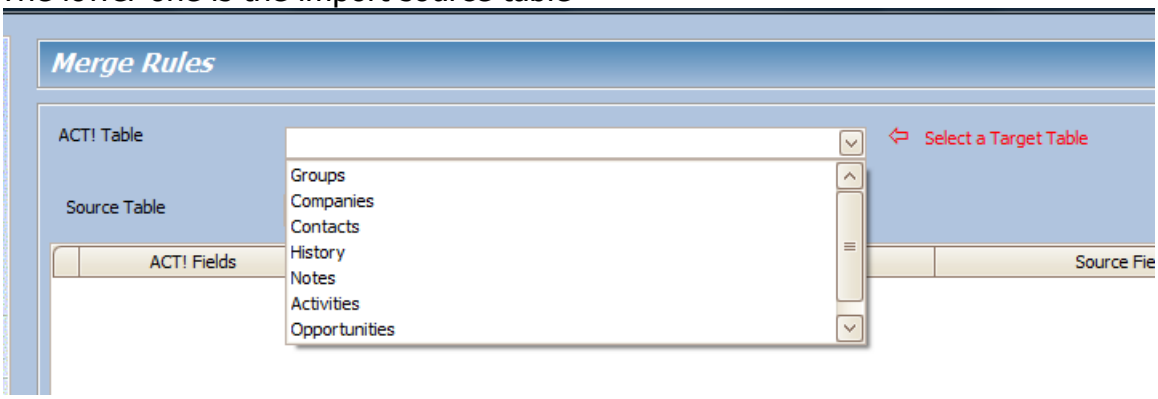
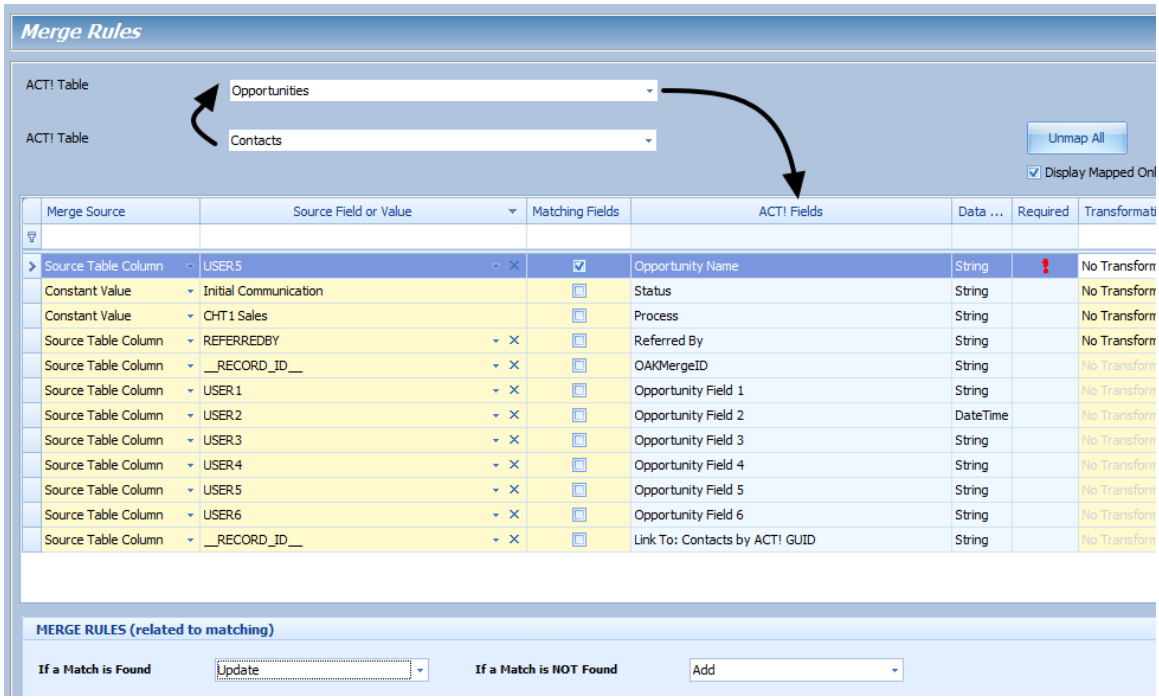
The top one is the Merge Destination Table (also called the target)
The lower one is the import source table



Tables for target and source:

A contact TO opportunity merge might be mapped like this



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You get a Validation dialog to warn you that you have not selected any matching fields, so you will be appending all records. You "Click here" and then the yes button to proceed.

Validation
There are warnings!
Please review items in the list and click 'Yes' if you are OK continuing to the next step.
The 'Yes' button is disabled if there are warnings that require special attention - please acknowledge them by clicking 'Click Here' icon next to the issue
Yes
No
... Severity Issue Items Accepted
Warning Matching Fields have not been defined for Target. Sourc...
Click here
Warning Some Source Fields have not been mapped.
Address 2
Address 3
Country
Private Group
State
ZIP Code

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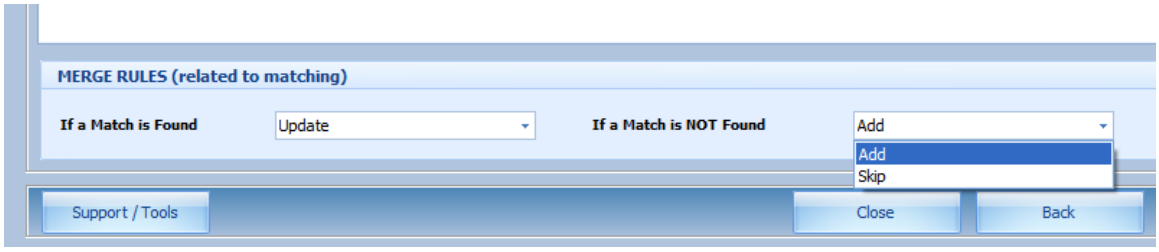
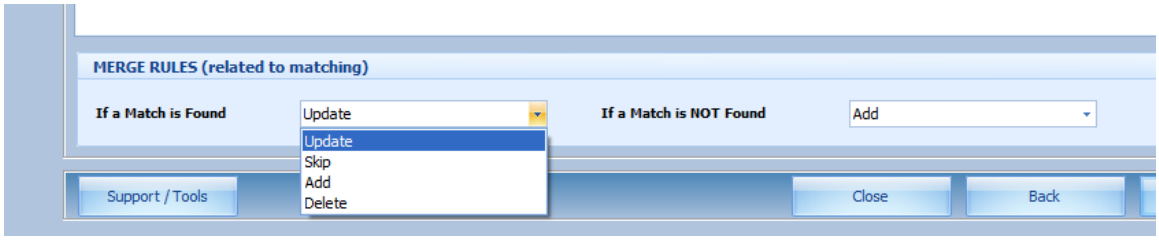
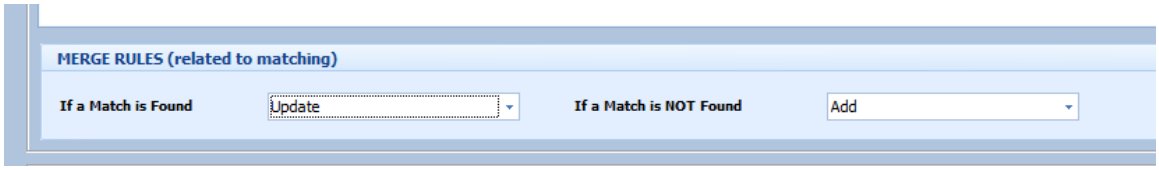
You pick what to match on and the Merge Rules
For cases where Contact does NOT match you can add or skip



For cases where Contact does match, you can update, skip, add, or delete



To update existing and Add new:



Above works for Contacts, Companies, Groups, Opportunities, Users and Products, Custom tables

History, Activities, Notes, Secondary Contacts, Product_Opportunities are append only

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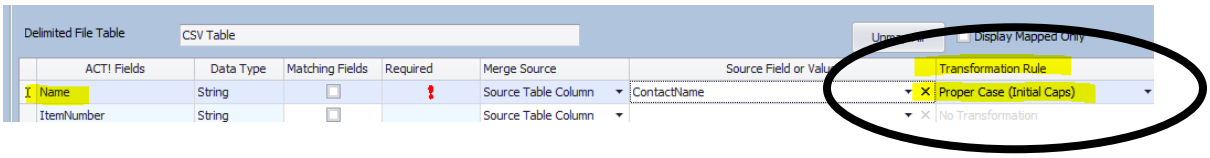
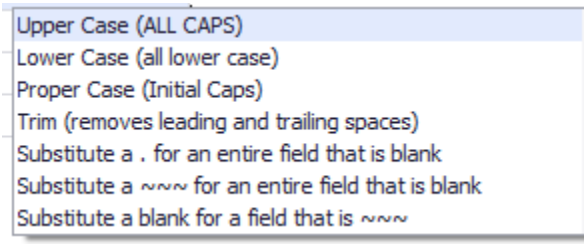
Example 20: Transformations and Reserved Key Words

You can use transformations or Reserved Key Words on text fields to change them as they are imported. Reserved Key Words will trigger data actions if found in ANY source field. They are always active and you do not have to use a transformation rule to use one of them. Transformations are **not** usable in date or numeric fields.

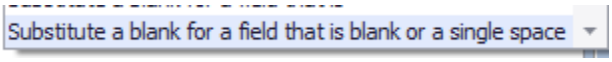
For example you could transform random text, all UPPER case, or all lower case to upper/lower Proper Case using the Proper Case Rule



Standard transformations include



Plus



In Addition to transformation Rules, Reserved Key Words can be used to alter text in if they are the source field value. The first Key Word released is $BLANK$ It can be used in a source file for some records or as a Source Constant Value for all rows.

For example you could match on contact name and blank out all the Referred By fields.

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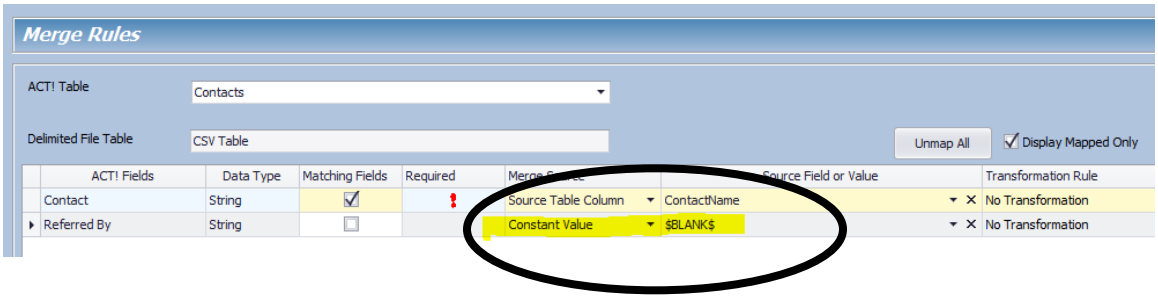
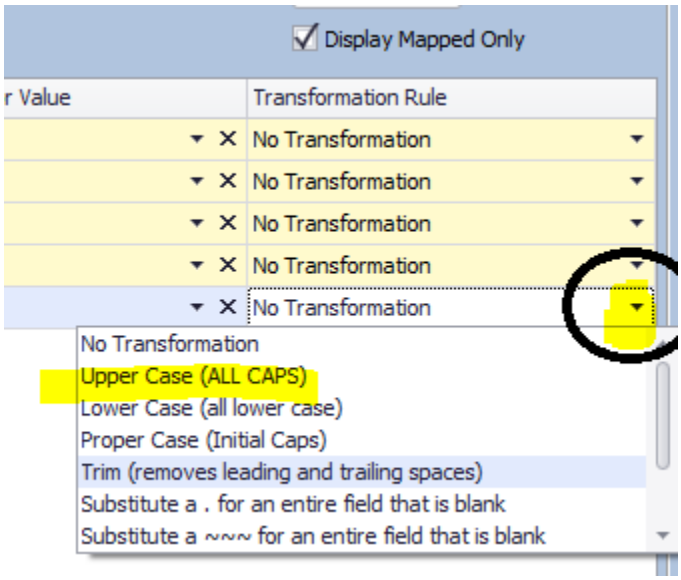


Transformation Definitions

Click the down arrow to see the available transformations



Upper Case

Converts Text to ALL CAPS
This is a test is transformed to: THIS IS A TEST

Lower Case

Converts Text to all lower case
This is a TEST is transformed to: this is a test

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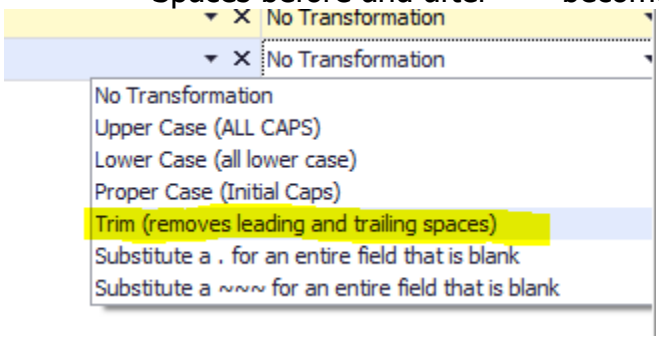
Proper Case

Converts Text so that the First Letter Of Each Word Is Capitalized and the rest is set to lower case
This is a TEST is transformed to: This Is A Test
Note: abc company or ibm is transformed to: Abc Company or Ibm

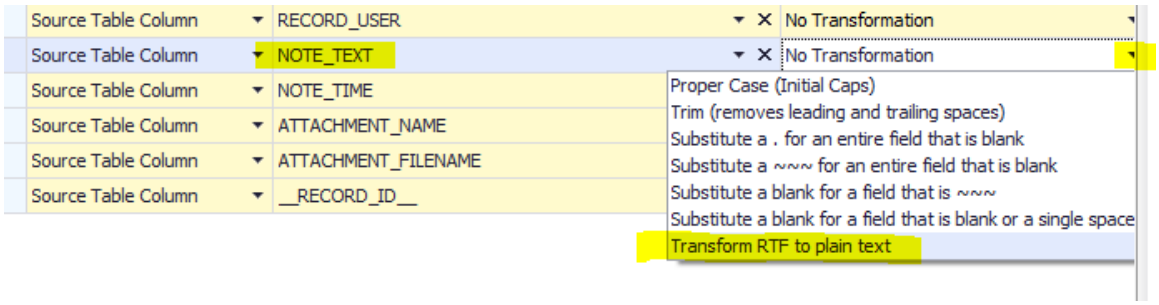
Trim

Removes leading and training spaces
" Spaces before and after " becomes "Spaces before and after"



Transform RTF to plain text

Converts Text from RTF format to plain text



TIP: Review the sample_exports.zip file in the samples folder to see the notes_text in RTF format (notes.csv) and transformed. (notes_transformed.csv)

TIP: : The transformations regarding blanks are similar to each other but work differently. The first 2 AVOID a blank field in ACT and the 2nd two FORCE a field in Act! to be blank. Also a reserved key word is available to blank a field. A Reserved key word is NOT a transformation rule but is another way to do the same thing in the case of $BLANK$

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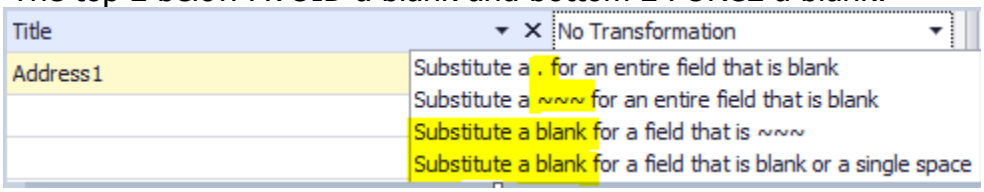
The top 2 below AVOID a blank and bottom 2 FORCE a blank:



Two ways to avoid blank fields in ACT if the source data is blank:

1. Substitute a . for an entire field that is blank

Converts a blank field in the source to one period ".",
Other text values are not affected
This means: if input is blank; put a "." in the field.
This could be used in a field where data is required.
A "." Is small and does not stand out on ACT layout .

2. Substitute a ~~~ for an entire field that is blank

Converts a blank field to three tildes "~~~",
Other text values are not affected
This means: if input is blank; put a "~~~" In the field.
This could be used in a field where you what to identify the blanks in a particular import or needed to do a search and replace in ACT after the merge. In Act! you could search for a ~~~ and replace with another string or have a dynamic group to find them.

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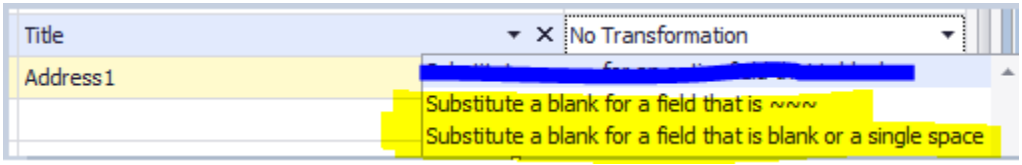
Three ways to FORCE blank fields into ACT
if the data in Act! is blank or has data:

Use 1 of 2 transformations or a Reserved Key Word: $BLANK$



1. Substitute a blank for a field that is exactly "~~~"

Overwrites a field in Act! with a blank field if the source is exactly equal to 3 tildes "~~~"
Other text values are not affected
This means: if input is"~~~"; blank out the field in Act!.

2. Substitute a blank for a field that is blank, or is equal to one or more spaces. "~~~"

Overwrites a field in Act! with a blank field if the source is blank
Other text values are not affected
This means: if input is blank; then blank out the field in Act!. This transformation will replace all the target records for this field, blank or new data from the source

Note that the default without this transformation is the source field is skipped if blank and the target field is not updated to blank.
The default is OAK!Merge does not change fields to blank if there is data in ACT and the import source is blank.

3. Use the Key word $BLANK$ described below.

Key words are available for special situations to change the target field. They may be used in the source file as data or as a constant value in the Mapping section. For text fields, the key words can be part of the string but for date and numeric fields, key words must be exactly equal to the string.

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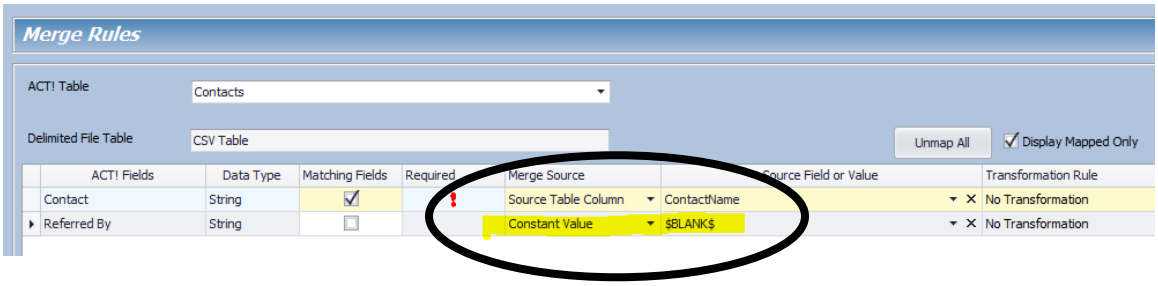
$BLANK$

$BLANK$ overwrites a field in Act! with a blank field if the source is contains $BLANK$
Other text values are not affected
This means: if input is $BLANK$ then remove all the data from the field in Act!.

If $BLANK$ is in the source file for a field or set as a Constant Value in the mapping, then the field will be blanked. This allows you to set all the records that match and are updated to a blank for the target field by using the Source Constant in the OAK!Merge mapping; OR you can use $BLANK$ as a value in the actual source data for some or all the rows in the source data for the target field.



Or in the data for example

RecordID, Referred By
1001,Trade Show 2009
1002,$BLANK$
1003,Trade Show 2011
1004,Trade Show 2011
1005,Trade Show 2011
1006,Trade Show 2009
1007,$BLANK$
1008,Trade Show 2011

Row 2 in 7 would over write any data in Act! for Referred by and blank the field only for that contact. This assumes you are matching on RecordID and Updating the contacts

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TIP: an example of using a $BLANK$ would be clear out old address 2s or sales reps that have changed; and there should be no data in the field for some records.

ALL KEYWORDS:

$BLANK$
(see previous section)

ROW
This adds the row number from the source file

$DATE$
This adds current system date

$DATETIME$
This adds current system date and time

$TIME$
This adds current system time

$USER$
This adds current Act! user who was used as a log in to do the merge.

$GUID$
This adds a new GUID (Globally Unique Identifier)

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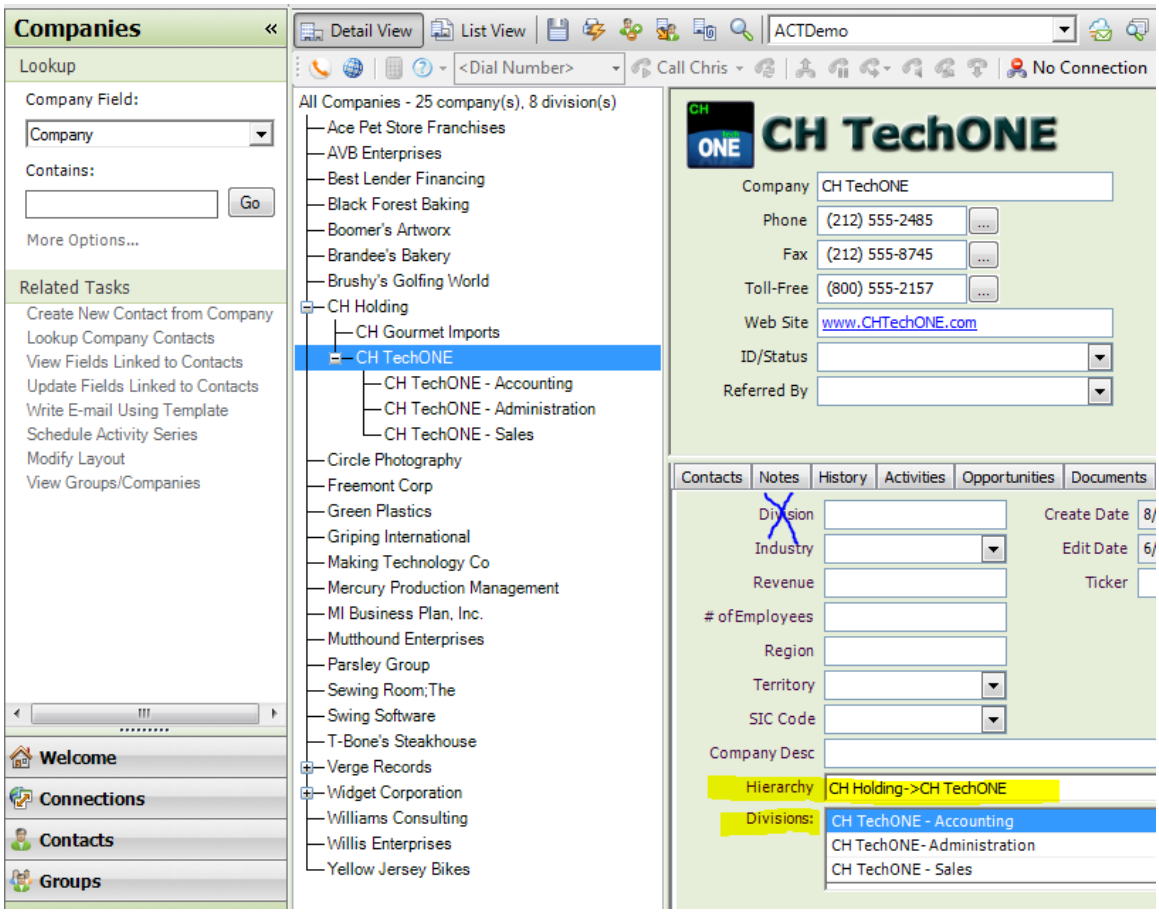
Example 21: Adding Divisions to Companies

OAK!Merge Version 14.3 and later supports Adding Companies as divisions of other companies. You can have multiple levels of Division to Division to Company.

"CH Holding" has 3 levels with 3 companies in the 3rd level in the Hierarchy shown below. You can create a Hierarchy of Divisions under parent companies. This does NOT use the Division Field in the company.



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Example- Sample merge in the Samples folder:
Samples\Company_WITH_Divisions_For_Hierarchy_14_4.csv

COMPANY	LINK_TO_Parent
Boomer's Artworx Subsidary 1	Boomer's Artworx
Boomer's Artworx Subsidary 2	Boomer's Artworx
Boomer's Artworx Subsidary 3	Boomer's Artworx
AAAA Flakes Inc.	Jake Flakes Inc.
BBBB Flakes Inc.	Jake Flakes Inc.
Vacation Tax Haven	Yellow Jersey Bikes

Before in ACT

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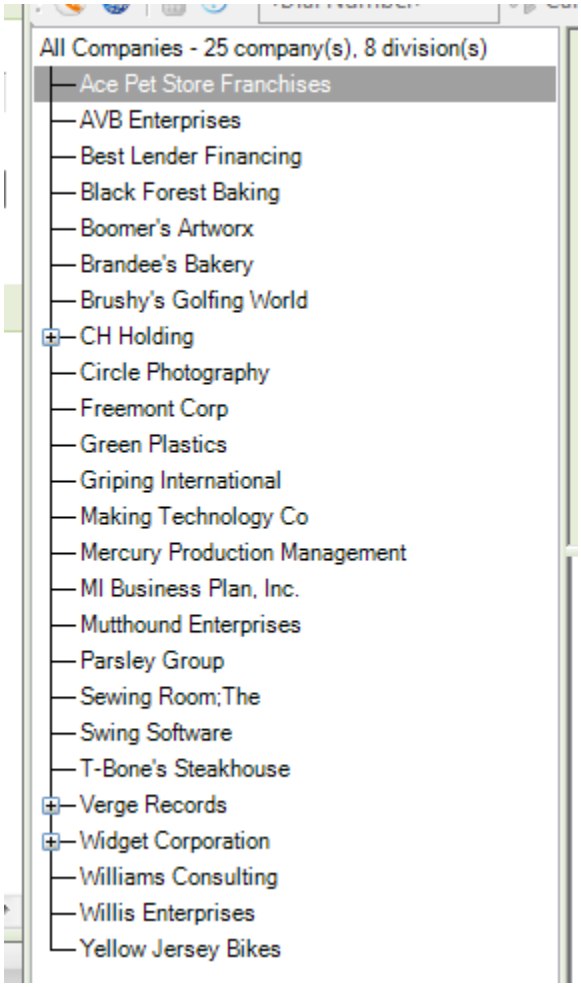

Execute Options can be to add new, skip or update existing Companies.
The Merge connects a division to its parent. The "Link To: Company by Name" is to make the company a division of its parent. The "Link To: Company by Name" has the parent's name.

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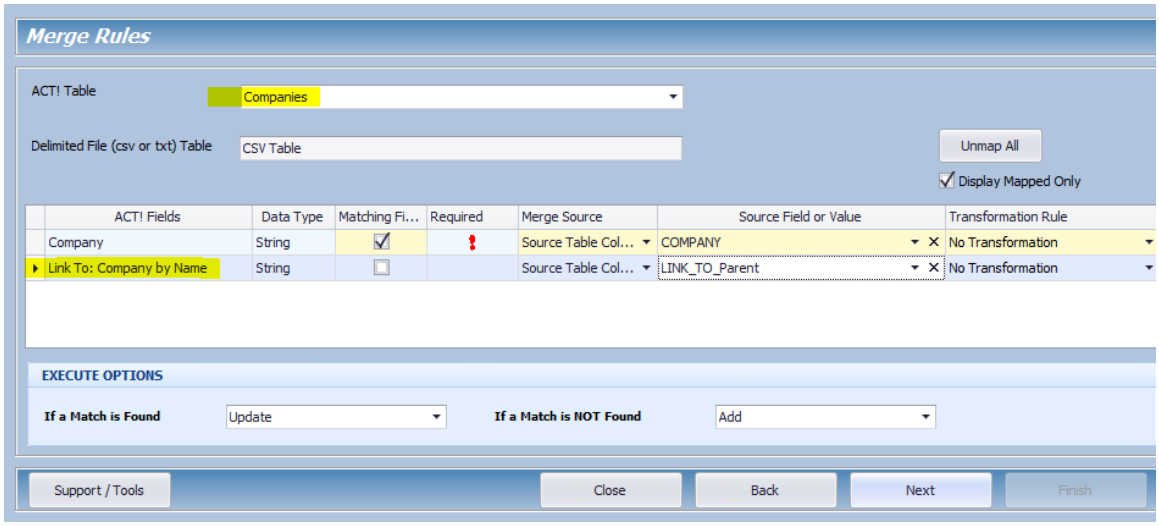
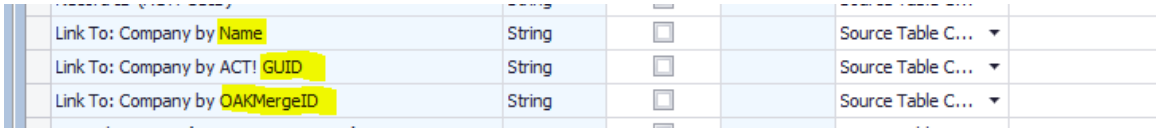


If an OAKMergeID field was created in the Company; it may be used to link the Division to the Parent Company. The ACT GUID of the Parent is also available to link the Division to the Parent Company.



TIP: You **cannot** link to a Company that does not already exist

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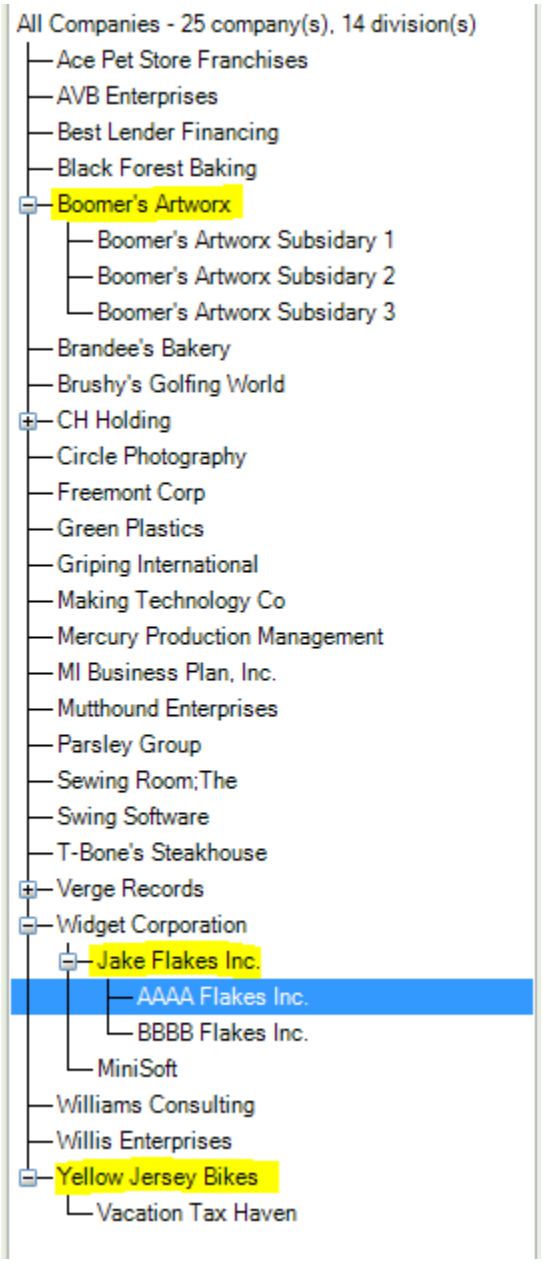
After



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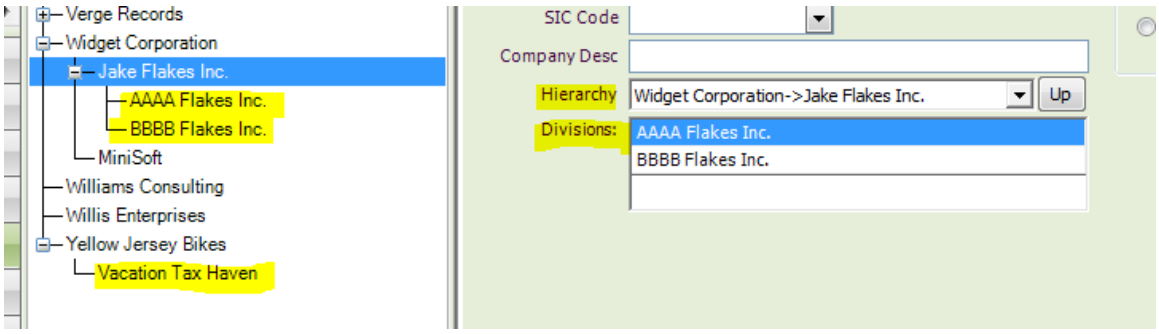
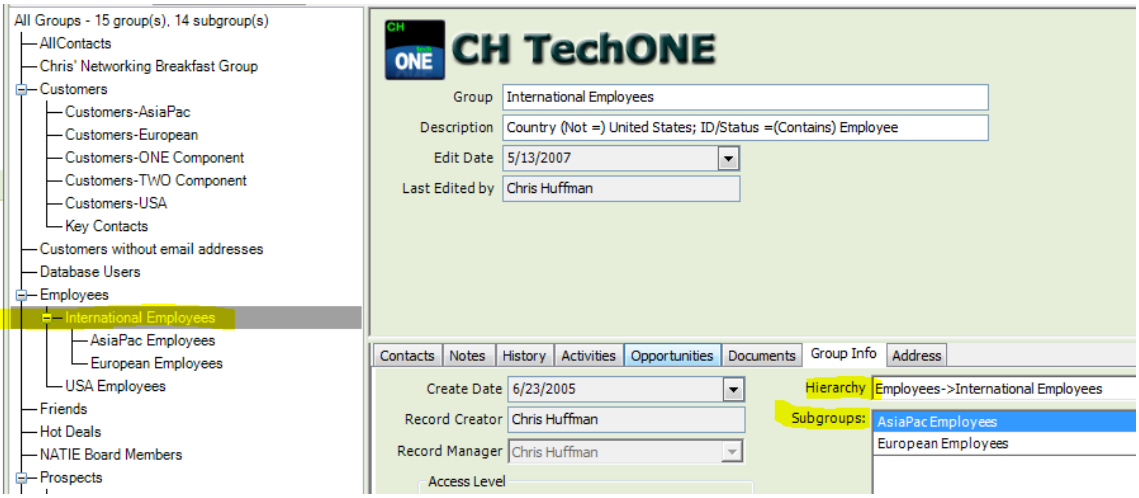


Example 22: Adding Sub Groups: to Groups

OAK!Merge Version 14.3 and later supports Adding Subgroups to groups. You can have multiple levels SubGroup to SubGroup to Group

This is very similar to linking companies above. You can have many Groups in a deep Hierarchy. :

Before



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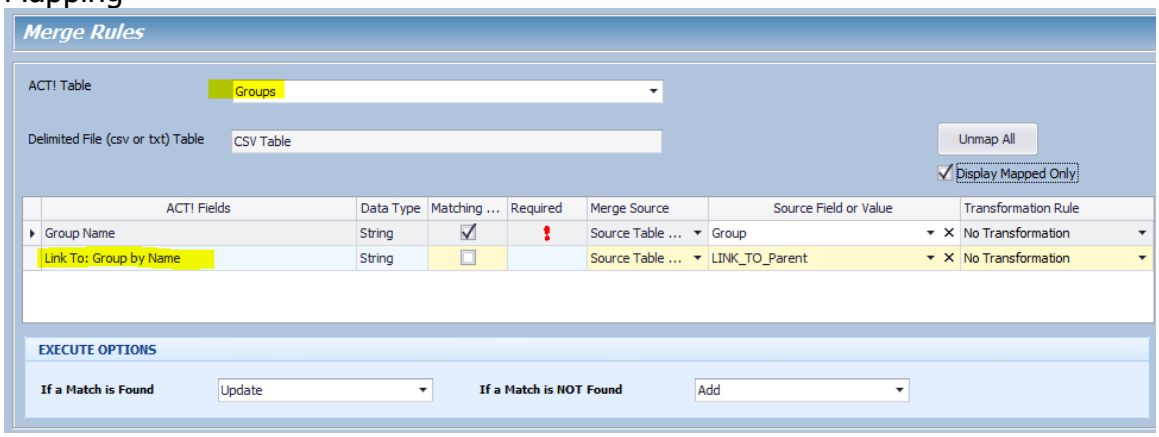
Sample Data: Samples\ Groups_WITH_Divisions_For_Hierarchy_14_4.csv

Group	LINK_TO_Parent
FaceBook	Friends
LinkedIN	Friends
Employees	Staff
Shift 1	Employees
Shift 2	Employees
Shift 3	Employees

Note that the Employees Group is in both columns above. It is a sub group of Staff and has its own subgroups that link to it.

TIP: : The Groups in the Link_to_Parent field above have to exist. OAK!Merge will not add them if they do not exist. It will add GROUP column entries, but not link to Group. "Staff" did not exist in the DEMO database, so you can run a merge to map Link_TO_Parent column to GROUP field to create any needed Groups. Another way of saying this is you cannot link to Group that does not already exist

Mapping



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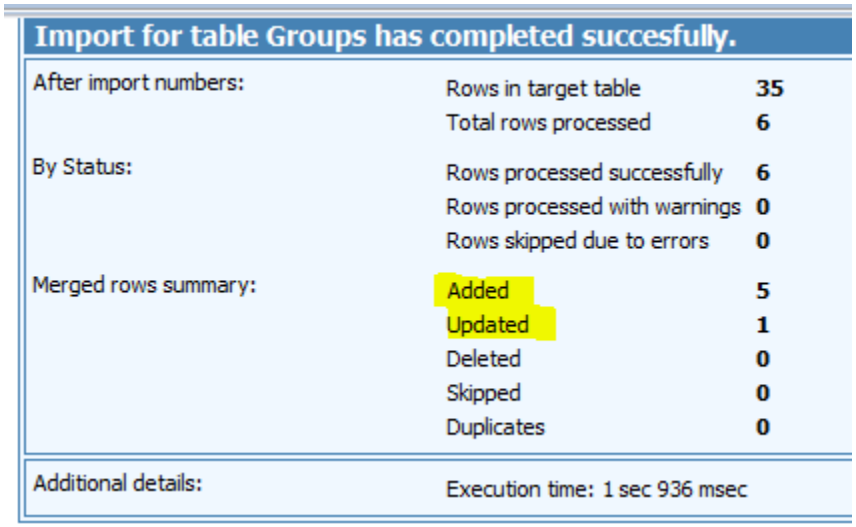
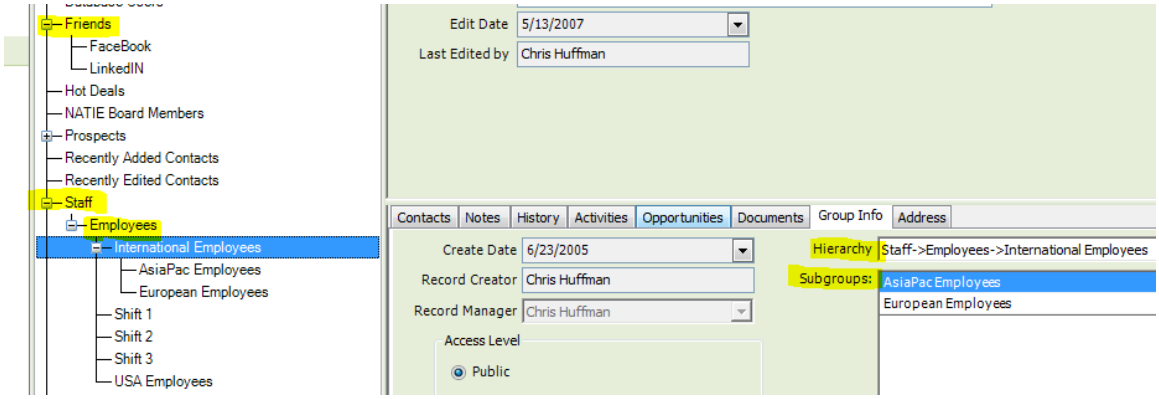


After:



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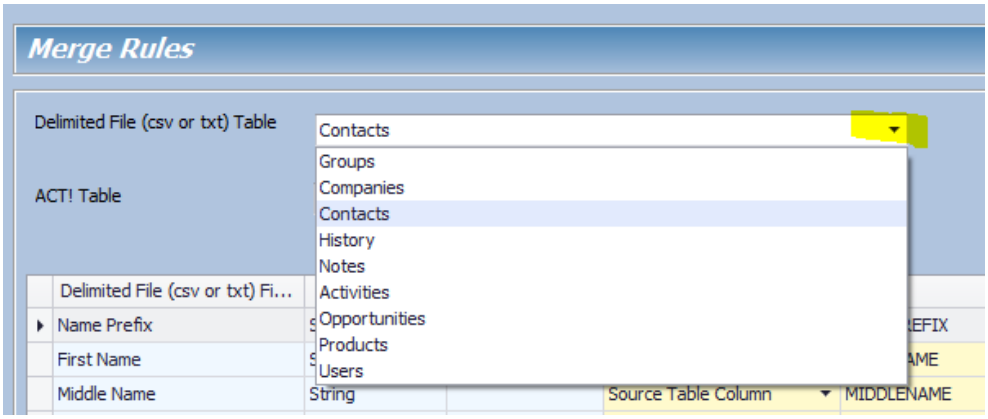
Example 23: Exporting all data from tables

OAK!Merge Version 14.3 Standard Edition and later supports exporting data from Act!. It exports all the exportable columns in the selected table and includes all the records in that table. Basic edition does not do exports.

It goes from an ACT table TO a CSV or XML format. The Source is an Act! database table and the only supported destinations (or "target") are a CSV text file or XML formatted file.

OAK!Merge will export the tables that each version can import starting at Standard. Only one table is non- exportable: secondary contacts. See the Roadmap for the capabilities of each version.

For note, activity, history items, if the corresponding item is linked to more than one parent item (company, contact, opportunity or group) it will be exported multiple times for each parent item.



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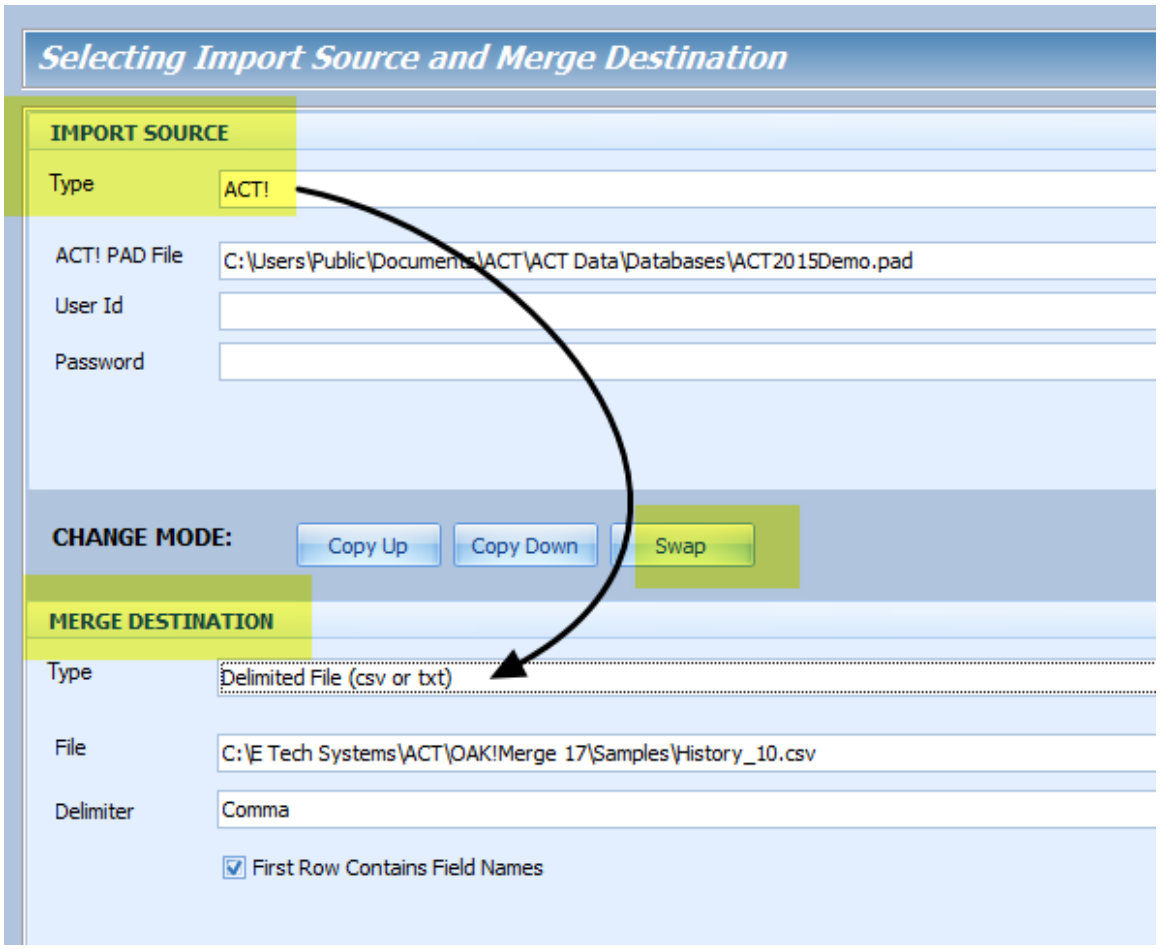
Example: Step by step- Exporting the History table

1. Use the Swap Button to set the Import Source, Type to ACT and the Merge Destination, Type to Delimited File (CSV or txt)



TIP: The Change Mode buttons are to Copy the lower panel info UP or Down; or the Swap them.

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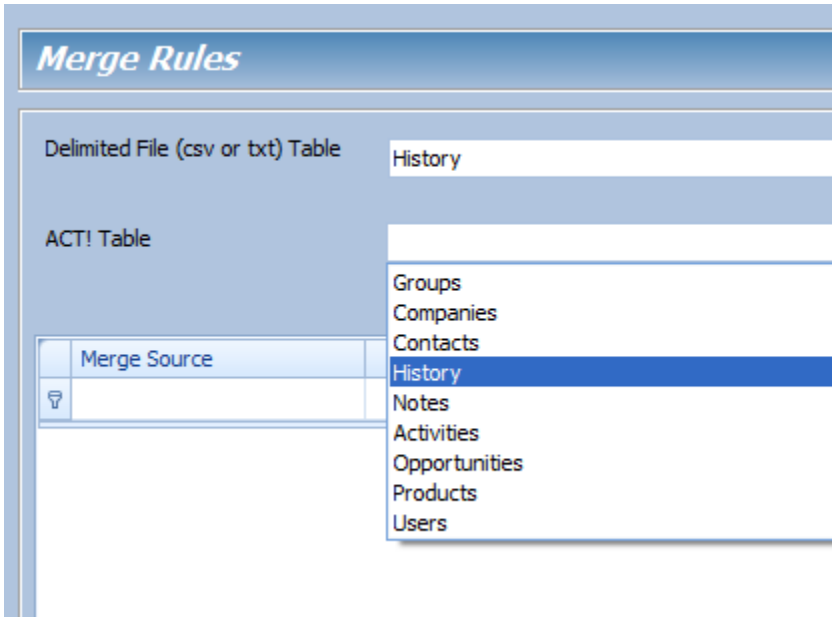
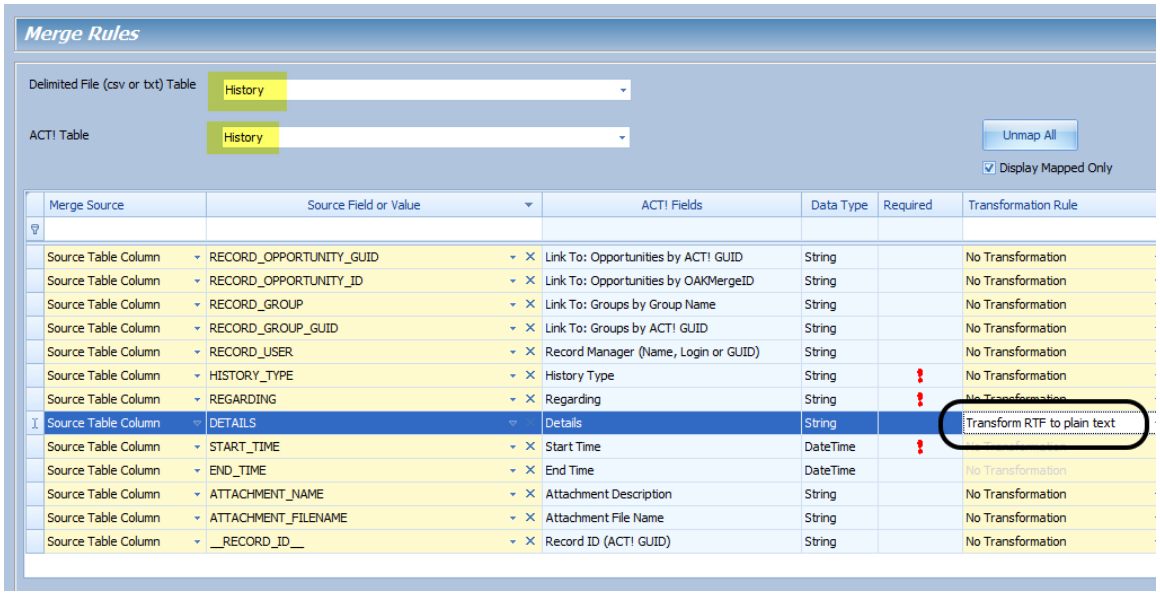
2. When exporting, always pick the same table name for the source and destination mapping on the merge rules



All available fields are mapped. You can unmap any you don't want exported.


Merge Rules
Delimited File (csv or txt) Table
History
ACT! Table
History
Unmap All
Display Mapped Only
Merge Source
Source Field or Value
ACT! Fields
Data Type
Required
Transformation Rule
Source Table Column RECORD_OPPORTUNITY_GUID Link To: Opportunities by ACT! GUID String No Transformation
Source Table Column RECORD_OPPORTUNITY_ID Link To: Opportunities by OAKMergeID String No Transformation
Source Table Column RECORD_GROUP Link To: Groups by Group Name String No Transformation
Source Table Column RECORD_GROUP_GUID Link To: Groups by ACT! GUID String No Transformation
Source Table Column RECORD_USER Record Manager (Name, Login or GUID) String No Transformation
Source Table Column HISTORY_TYPE History Type String No Transformation
Source Table Column REGARDING Regarding String
Source Table Column DETAILS Details String Transform RTF to plain text
Source Table Column START_TIME Start Time DateTime
Source Table Column END_TIME End Time DateTime No Transformation
Source Table Column ATTACHMENT_NAME Attachment Description String No Transformation
Source Table Column ATTACHMENT_FILENAME Attachment File Name String No Transformation
Source Table Column __RECORD_ID__ Record ID (ACT! GUID) String No Transformation

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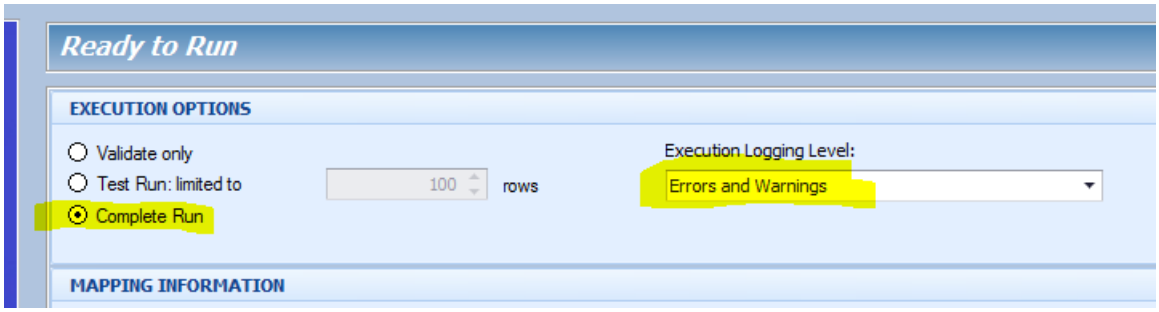
TIP: use the transformation "Transform RFT to plain text" for details to remove formatting characters.

3. Run



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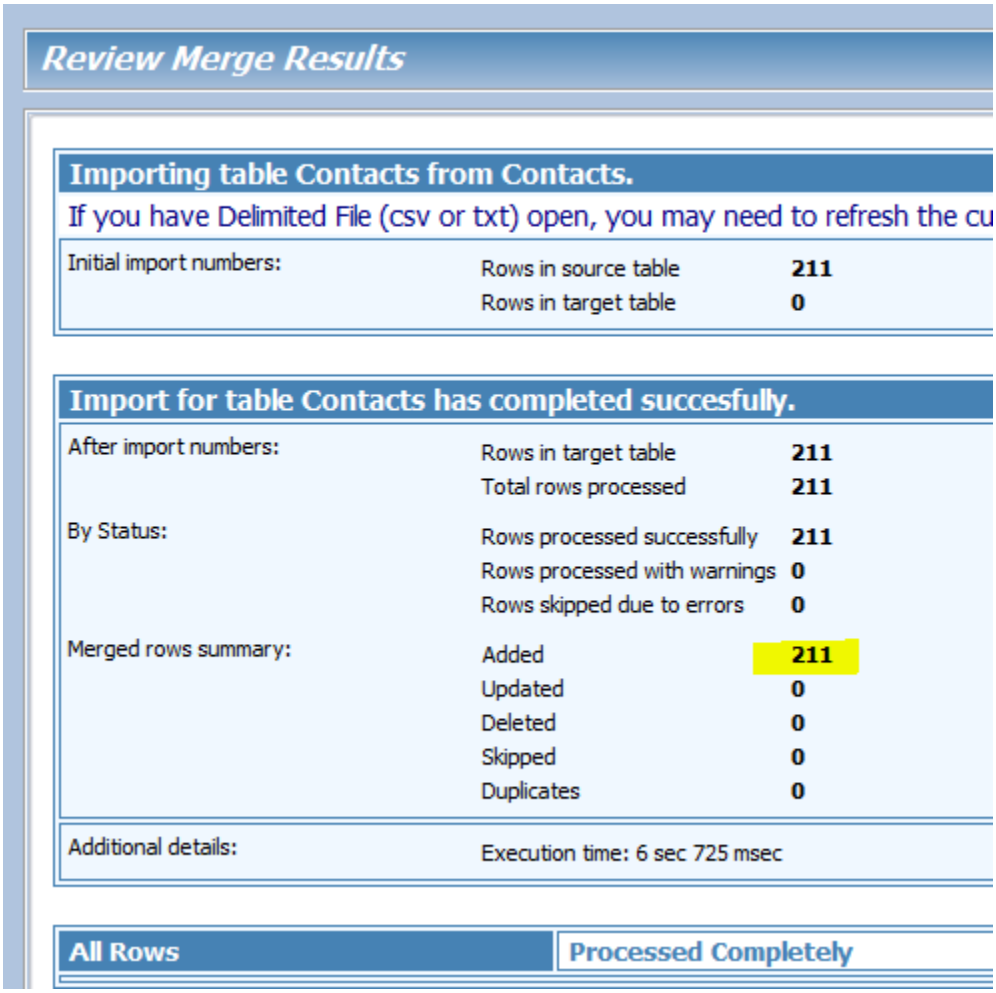
Review Merge Results
Importing table Contacts from Contacts.
If you have Delimited File (csv or txt) open, you may need to refresh the cu
Initial import numbers:
Rows in source table 211
Rows in target table 0
Import for table Contacts has completed succesfully.
After import numbers:
Rows in target table 211
Total rows processed 211
By Status:
Rows processed successfully 211
Rows processed with warnings 0
Rows skipped due to errors 0
Merged rows summary:
Added 211
Updated 0
Deleted 0
Skipped 0
Duplicates 0
Additional details:
Execution time: 6 sec 725 msec
All Rows
Processed Completely

TIP: : Review the sample_exports.zip file in the samples folder to see how the data is exported. Use the RTF to Text transformation if you want plain text for the details in History or Note_text in notes. There is also a sample of the notes_text in RTF format (notes.csv) and transformed. (notes_transformed.csv) in the sample_exports.zip file in the samples folder

TIP: You can use Constant Values and/or KEYWORDS: in both imports and exports. They also can be inserted with other text or combined (except $BLANK$)

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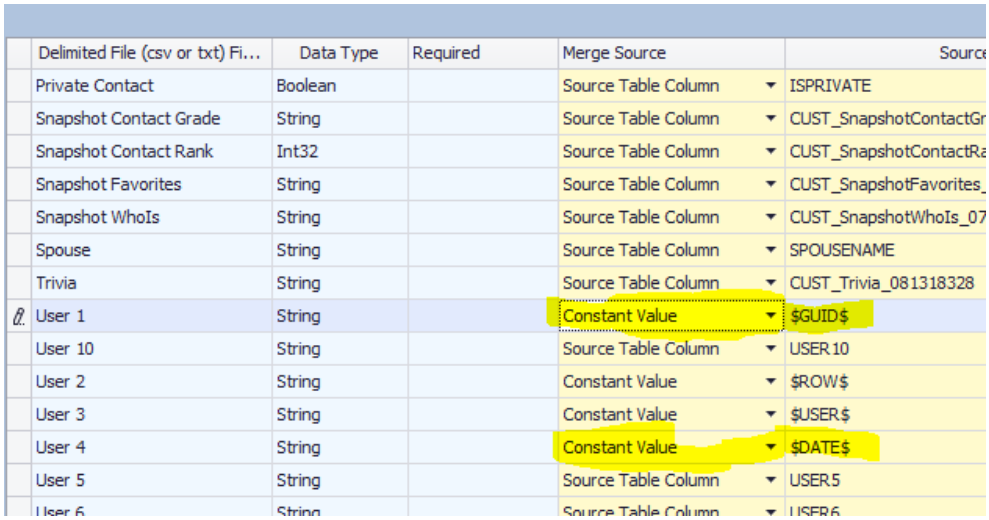

Delimited File (csv or txt) Fi...	Data Type	Required	Merge Source	Source
Private Contact	Boolean		Source Table Column	ISPRIVATE
Snapshot Contact Grade	String		Source Table Column	CUST_SnapshotContactGr
Snapshot Contact Rank	Int32		Source Table Column	CUST_SnapshotContactRa
Snapshot Favorites	String		Source Table Column	CUST_SnapshotFavorites_
Snapshot WhoIs	String		Source Table Column	CUST_SnapshotWhoIs_07
Spouse	String		Source Table Column	SPOUSENAME
Trivia	String		Source Table Column	CUST_Trivia_081318328
User 1	String		Constant Value	$GUID$
User 10	String		Source Table Column	USER10
User 2	String		Constant Value	ROW
User 3	String		Constant Value	$USER$
User 4	String		Constant Value	$DATE$
User 5	String		Source Table Column	USER5
User 6	String		Source Table Column	USER6

$GUID$ ROW $USER$ $DATE$ $DATETIME$ $TIME$
(see keywords section for definitions) Results in:

BD	BE	BF	BG	BH	BI
USER1	USER10	USER2	USER3	USER4	USER5
30dcf716-4dd9-49cd-9727-3a2892197695		1	Alan	12/27/2011	
b93ae4fd-ab00-4fdf-ac83-cd429aa7381f		2	Alan	12/27/2011	
80bc7053-83e4-4ff2-9358-9afc42e35fad		3	Alan	12/27/2011	
75679789-52a3-439d-b287-17aebc86be4a		4	Alan	12/27/2011	
18cc21fb-7c16-4327-b17d-d670fd287755		5	Alan	12/27/2011	
03878556-a7fc-445a-baf2-cabb8e41e51a		6	Alan	12/27/2011	
359f19f3-f4f6-4815-a4cf-3b7b0d1d53d0		7	Alan	12/27/2011	
69353485-728f-4f51-8f6c-9676086cf741		8	Alan	12/27/2011	

EXPORTING THE GROUP MEMBERSHIPS LIST

This exports a CSV of all the Group Names linked to each Contact or Opportunity. These are in a field in exports called **__GROUPS__** which contains the comma delimited list of names of the groups. Both Static and Dynamic group memberships are included.

This adds a column to contacts and opportunities, but not companies. Companies are not allowed in ACT Groups.

This does **not** give you a list of all the contacts in a Group. It does tell you which groups each person is in.

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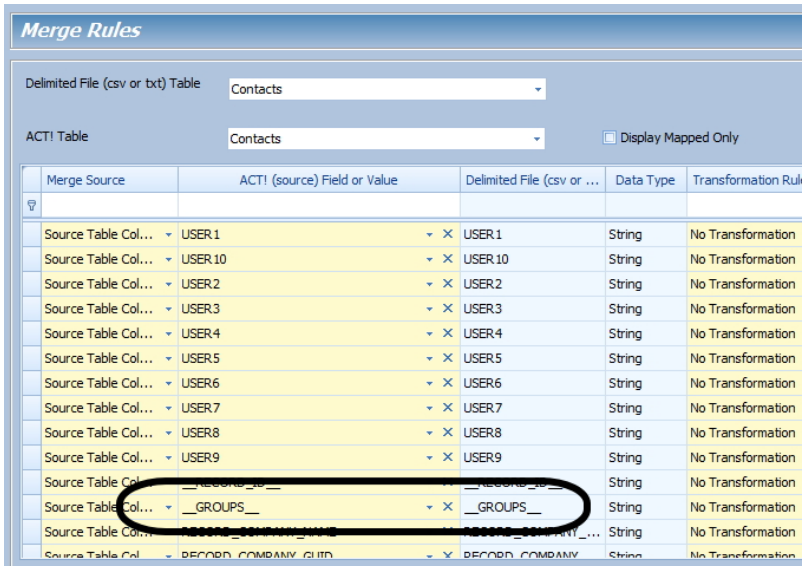
TIP: The Group tab in ACT shows many opportunities, but they are a roll up of opportunities within contacts; like history. The opportunities export does not list these. Look at the groups that are in the Groups Tab in opportunities


Merge Rules
Delimited File (csv or txt) Table
Contacts
ACT! Table
Contacts
Display Mapped Only
Merge Source
ACT! (source) Field or Value
Delimited File (csv or ...
Data Type
Transformation Rul
Source Table Col... USER1 USER1 String No Transformation
Source Table Col... USER10 USER10 String No Transformation
Source Table Col... USER2 USER2 String No Transformation
Source Table Col... USER3 USER3 String No Transformation
Source Table Col... USER4 USER4 String No Transformation
Source Table Col... USER5 USER5 String No Transformation
Source Table Col... USER6 USER6 String No Transformation
Source Table Col... USER7 USER7 String No Transformation
Source Table Col... USER8 USER8 String No Transformation
Source Table Col... USER9 USER9 String No Transformation
Source Table Col... __GROUPS__ __GROUPS__ String No Transformation

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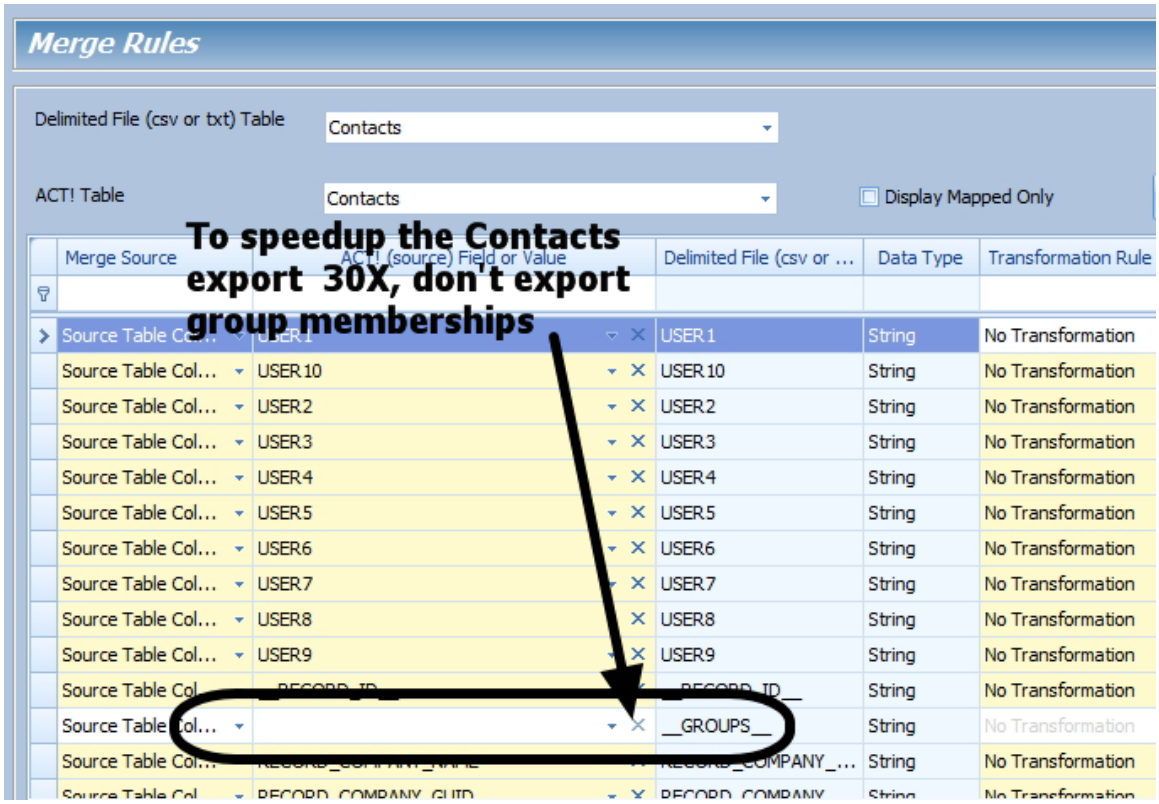
TIP: Avoid slow exports: Exporting Group memberships greatly extends the run time for exports with groups, so if you don't have them , then don't map __Groups__ on the export map. This will speed up the export.



Example 24: Filtered Export will Export data for only selected Contacts

This affects only Contacts, Notes, Histories, or Activities. Not the companies, Groups, users, or Opportunities tables.

Companies, Groups, users, or Opportunities Export runs will export ALL rows every time you select one of them.

OAK!Merge Version 17.1.2 Standard Edition and later supports exporting data from Act! for only the contacts in a specified group

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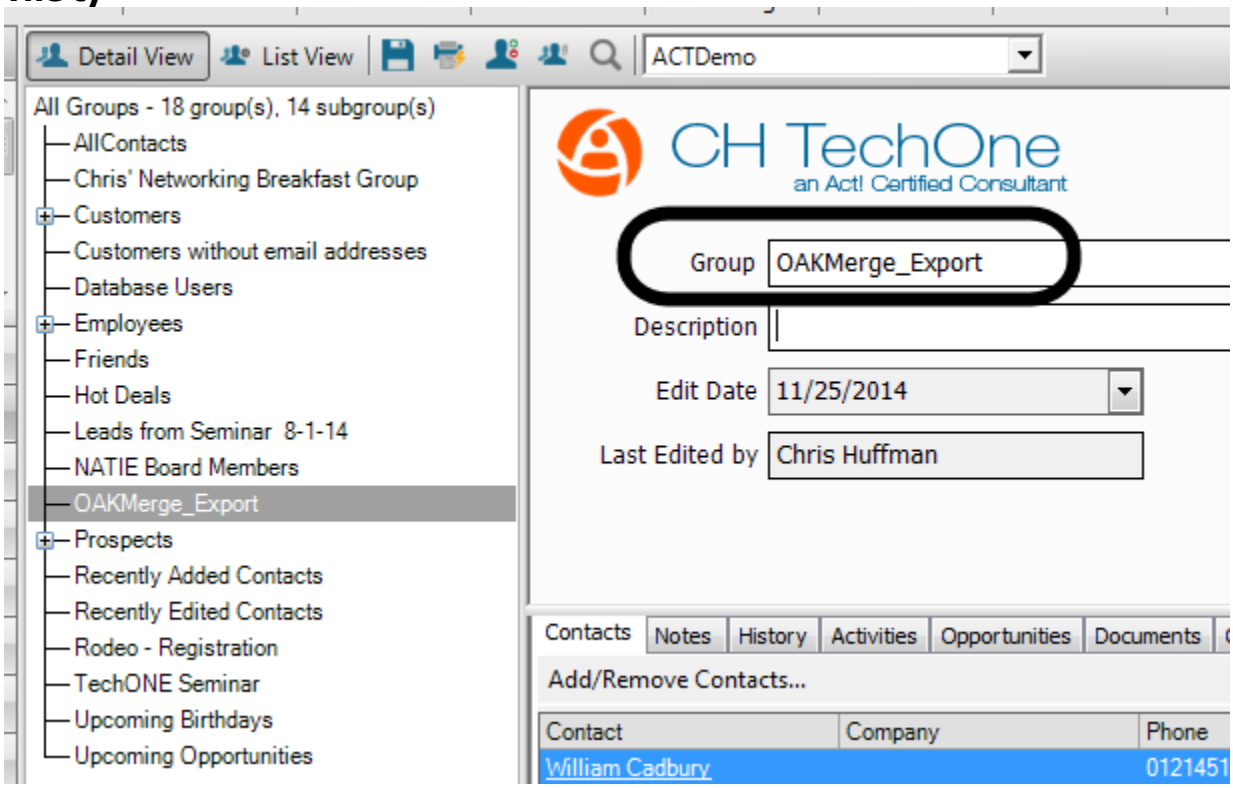
Filtered Exports limit exports to contacts in a group called OAKMerge_Export It has to be call this: OAKMerge_Export

The ty



This will limit the exports to contacts or records linked to the contacts that are in a specific group called OAKMerge_Export. This can filter the Contacts, Notes, Histories, or Activities.

Using a History export as an example there are 3 possibilities.

1. The OAKMerge_Export Group does not exist. You get all histories linked to all entities: Companies, Contacts, Groups, Opportunities.
2. The OAKMerge_Export Group exists and is empty. This is the same as the Group does not exist: You get all histories and all links to all entities
3. The OAKMerge_Export Group exists and has 1 or more contacts. You get all histories linked but only to those contacts in the group. You only the

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hsitories and and links contacts in the group; (not any histories linked to Companies, Groups, or Opportunities)

4.

For example if you had 50 contacts in the OAKMerge_Export group and you exported the history: only the history linked to those 50 contacts would export. **All exports are filtered this way if this group exists and has 1 or more contact members.** Both Static and Dynamic group memberships are used.

The Standard export for the ACTDEMO database that is not Filtered, will export 1462 rows of history. It has 397 Histories linked to Companies, 843 for contacts; 1 for Groups; and 221 for Opportunities. The export of all contacts via a Filtered export yields only the 843 history records for the contacts. The other history linked to Companies, Groups and Opportunities is NOT exported.

TIP: If you want history linked to contacts; but not the links of history to Companies, Groups, and opportunities; create a OAKMerge_Export Group with all contacts OR no contacts; and then do the history export. A dynamic group of "Create Date" "Contains data" will always have all contacts. This will export the history for all contacts, but not for the other entries.

TIP: Exporting Group memberships greatly extends the run time for exports with groups, so if you don't have them , then don't map __Groups__ on the export map. This will speed up the Contacts export. For example, 208 contacts in the Demo database went from 71 seconds to 3 seconds for the export.

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Example 25: Import and Export Data in XML Format

Import and Export data in XML format

XML format is supported for both imports and exports. Imports must be a simple data set. An XML file for use as a source may have more than one table, but only one may be selected to be use during a merge. This is similar to picking which table or query to use in an ACCESS database or which worksheet in an Excel workbook.

The XML format is an XML table. You can export and import using this format. You can open exported XML files "as an XML Table" in Excel. Do an export and open in notepad to see the raw format.

Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding files in a format which is both human-readable and machine-readable.

Tip: OAK!Merge exports ALL data elements each time; but not all XML programs do. Some XML generators only include data elements IF DATA IS PRESENT. If you are using XML as a source for unattended merges; you will need the same data elements in the source file each time in order for the OAK!Merge profiles to work.

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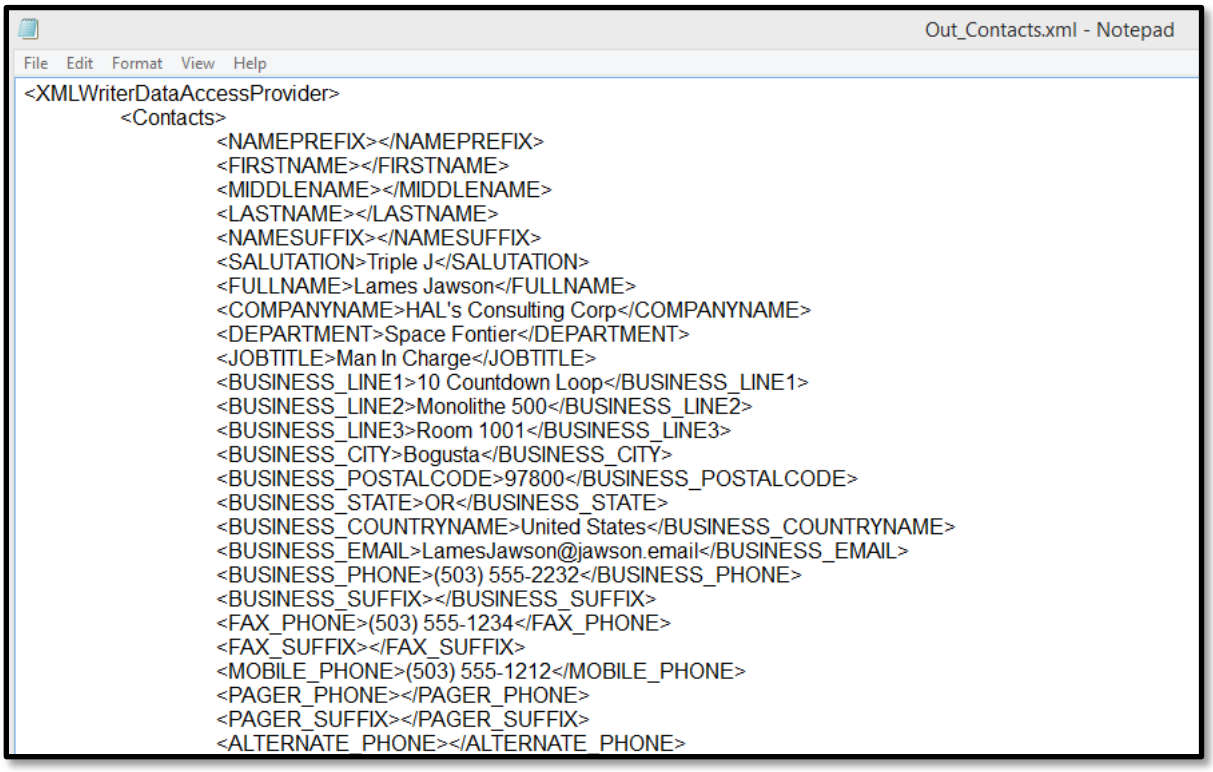
Example; The contacts table exported to XML starts out as



Or you can open XML exports as Table in Excel or ACCESS

Any XML from an OAK!Merge export can be opened in Excel as an XML Table

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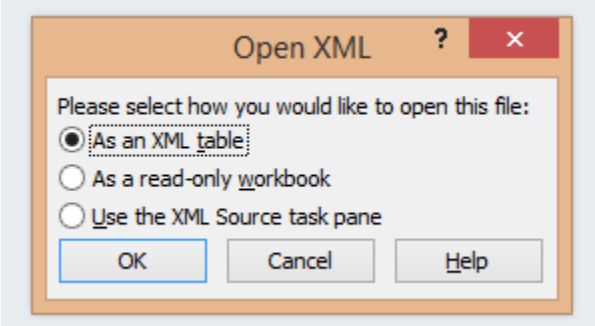
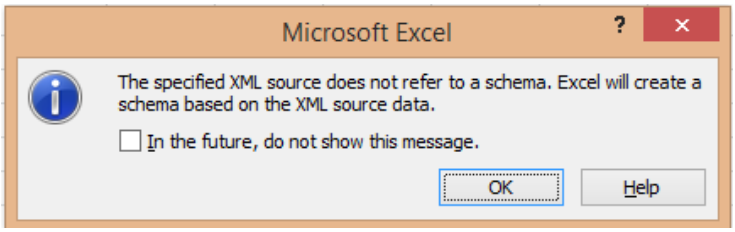
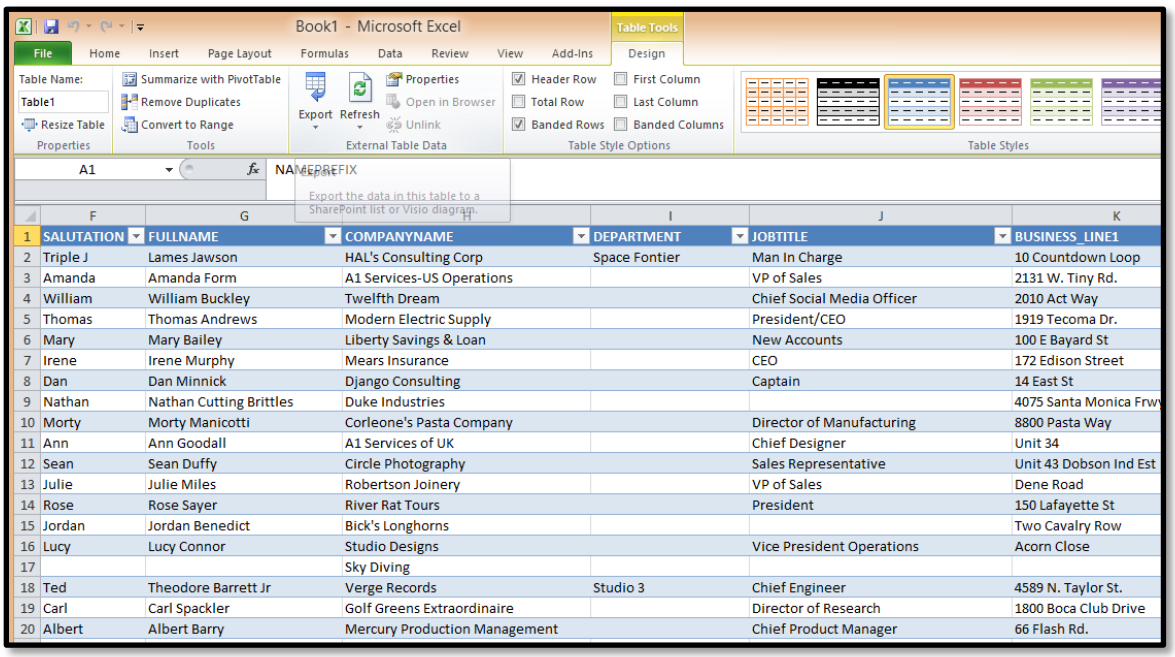
IN EXCEL you get 2 questions, click on OK




Microsoft Excel
The specified XML source does not refer to a schema. Excel will create a schema based on the XML source data.
In the future, do not show this message.
OK
Help

A Contact export in XML, and opened in Excel looks like this



	F	G	H	I	J	K
1	SALUTATION	FULLNAME	COMPANYNAME	DEPARTMENT	JOBTITLE	BUSINESS_LINE1
2	Triple J	Lames Jawson	HAL's Consulting Corp	Space Fontier	Man In Charge	10 Countdown Loop
3	Amanda	Amanda Form	A1 Services-US Operations		VP of Sales	2131 W. Tiny Rd.
4	William	William Buckley	Twelfth Dream		Chief Social Media Officer	2010 Act Way
5	Thomas	Thomas Andrews	Modern Electric Supply		President/CEO	1919 Tecoma Dr.
6	Mary	Mary Bailey	Liberty Savings & Loan		New Accounts	100 E Bayard St
7	Irene	Irene Murphy	Mears Insurance		CEO	172 Edison Street
8	Dan	Dan Minnick	Django Consulting		Captain	14 East St
9	Nathan	Nathan Cutting Brittles	Duke Industries			4075 Santa Monica Frwy
10	Morty	Morty Manicotti	Corleone's Pasta Company		Director of Manufacturing	8800 Pasta Way
11	Ann	Ann Goodall	A1 Services of UK		Chief Designer	Unit 34
12	Sean	Sean Duffy	Circle Photography		Sales Representative	Unit 43 Dobson Ind Est
13	Julie	Julie Miles	Robertson Joinery		VP of Sales	Dene Road
14	Rose	Rose Sayer	River Rat Tours		President	150 Lafayette St
15	Jordan	Jordan Benedict	Bick's Longhorns			Two Cavalry Row
16	Lucy	Lucy Connor	Studio Designs		Vice President Operations	Acorn Close
17			Sky Diving			
18	Ted	Theodore Barrett Jr	Verge Records	Studio 3	Chief Engineer	4589 N. Taylor St.
19	Carl	Carl Spackler	Golf Greens Extraordinaire		Director of Research	1800 Boca Club Drive
20	Albert	Albert Barry	Mercury Production Management		Chief Product Manager	66 Flash Rd.

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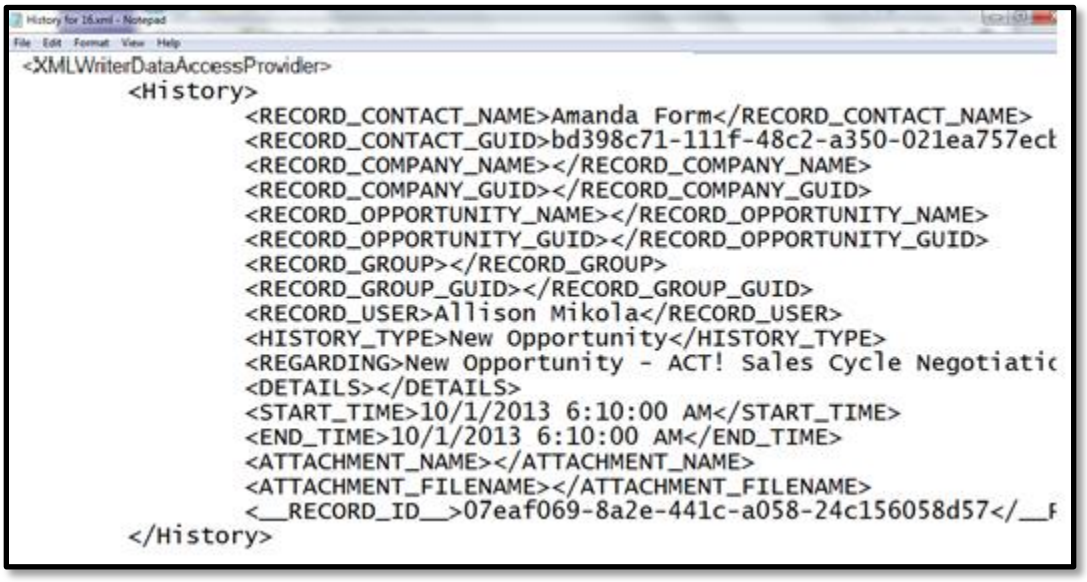
A History export in XML, and viewed in Notepad looks like this



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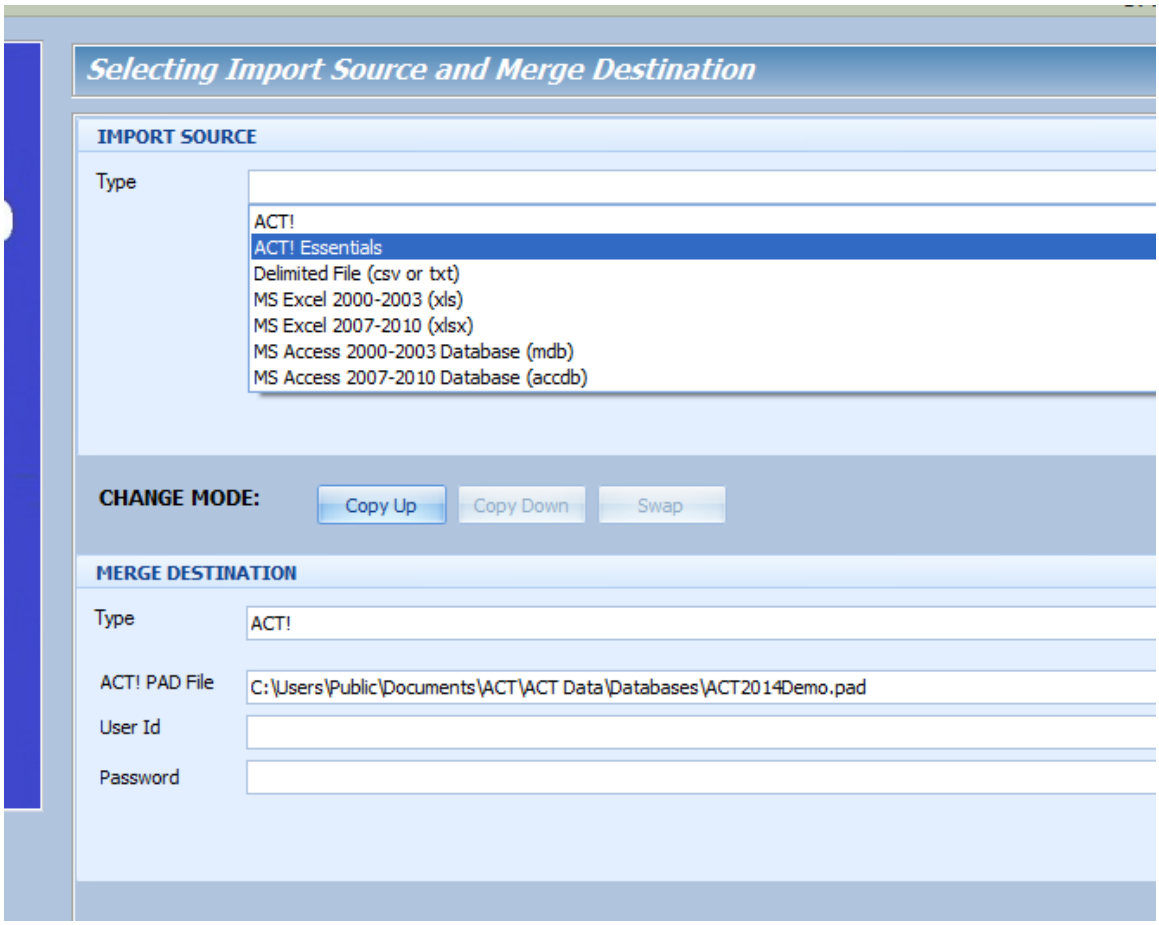
Example 26: Import and Export from Act! Essentials

OAK!Merge supports importing and exporting to the Act! Essentials cloud version. The first table supported is the Contacts. You can add new contacts, delete, or update info in existing contacts. You can also export all the contacts.

Just pick Act Essentials as a source or target and add your API key.



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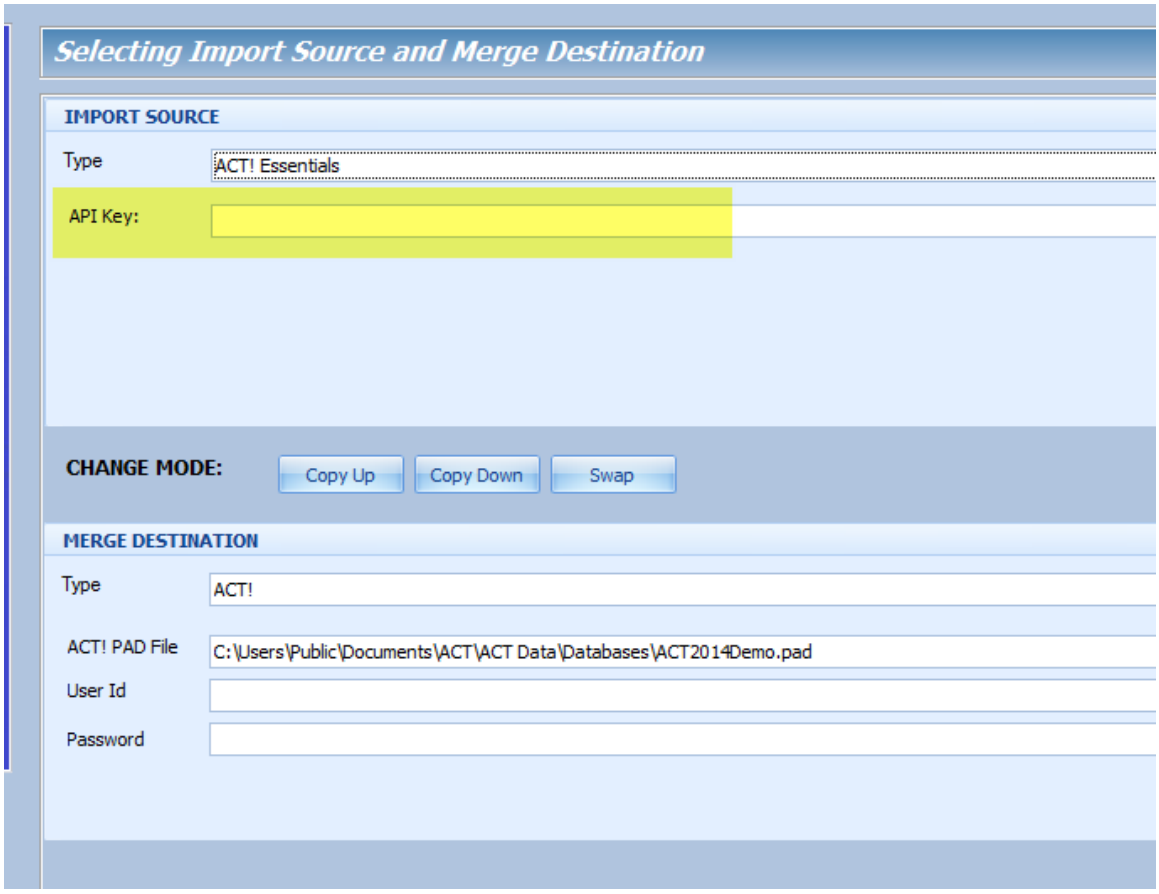
OAK!Merge User's Guide

Version 18.1.1 Revised December 8, 2015



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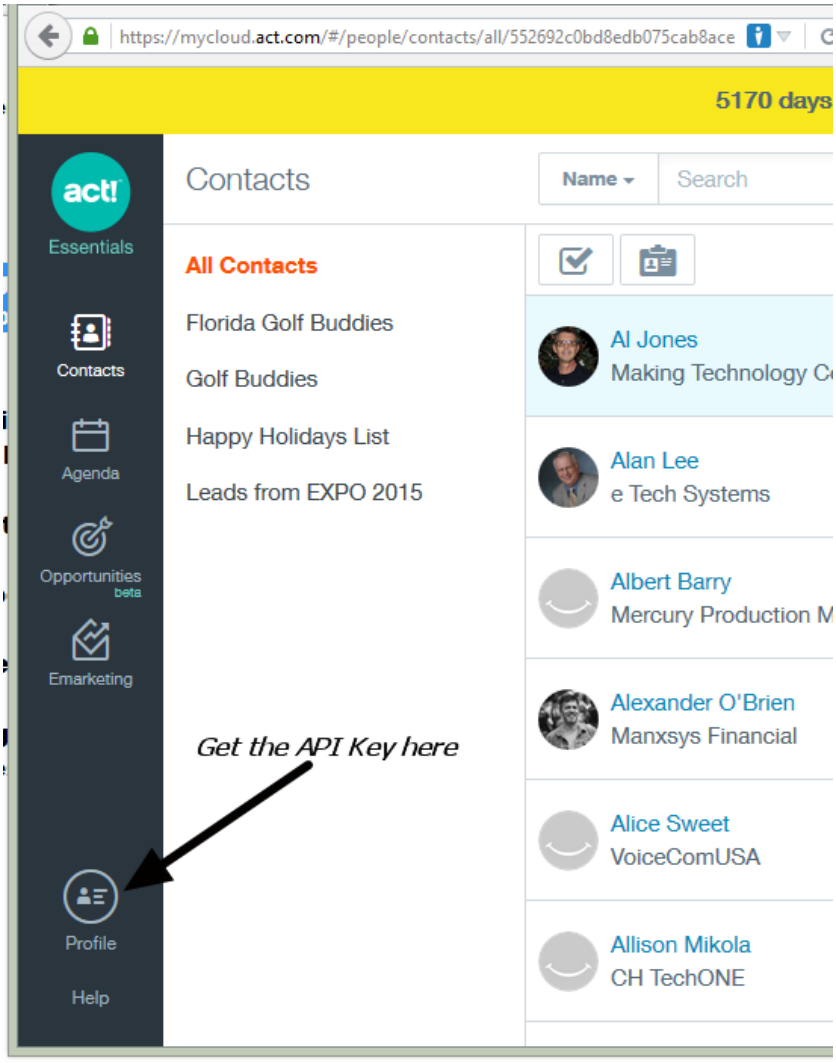

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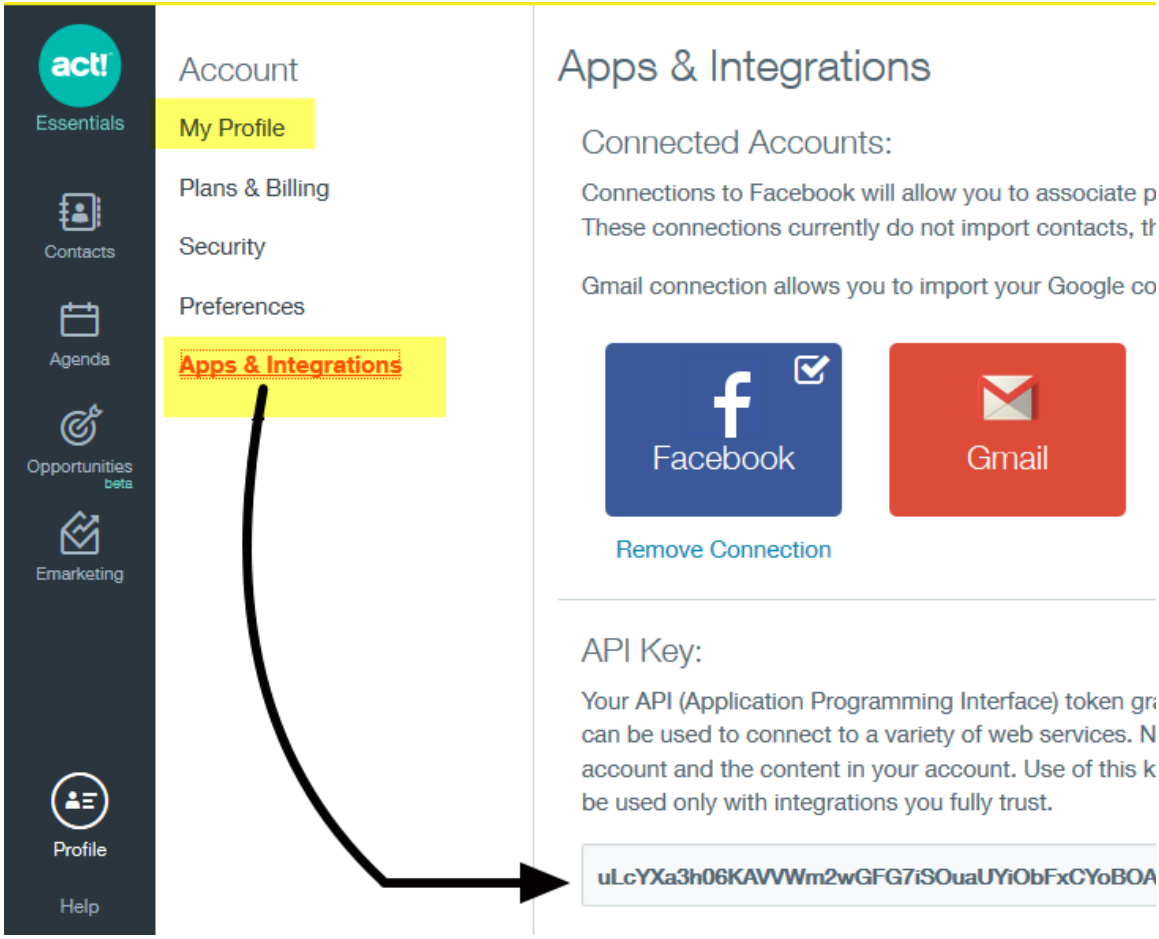

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Example 27: Delete History or Notes

Delete Specific history or note records.

OAK!Merge Standard or higher allows deleting specific history or notes entries (rows in the table) by specifying their ID number

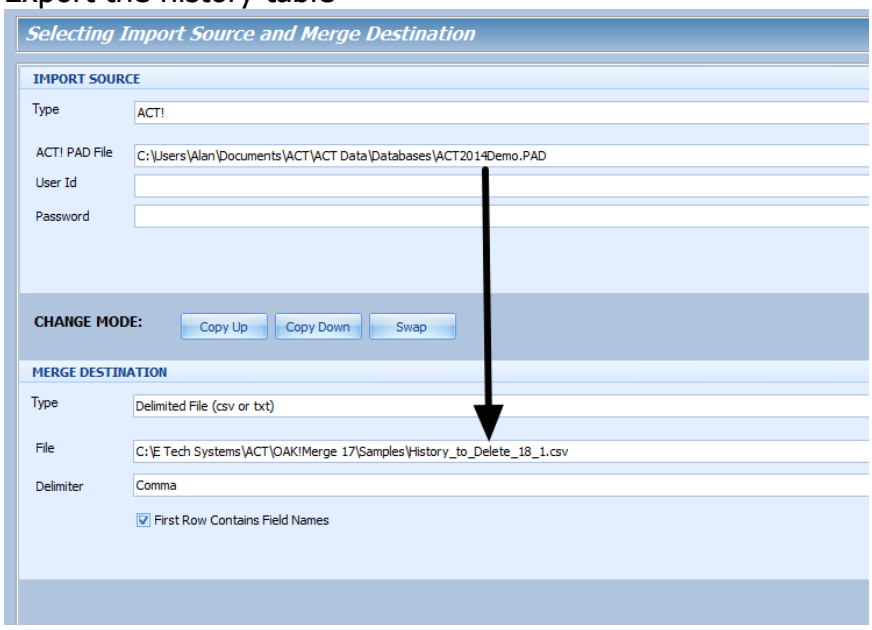
You export the notes or history to find the ones you want to delete and use their IDs to specify which ones you want deleted

The export does respect the limit to contacts in the OAKMERGE_EXPORT group.

The only field you map is the ID of the history or note records.

Steps:

Export the history table



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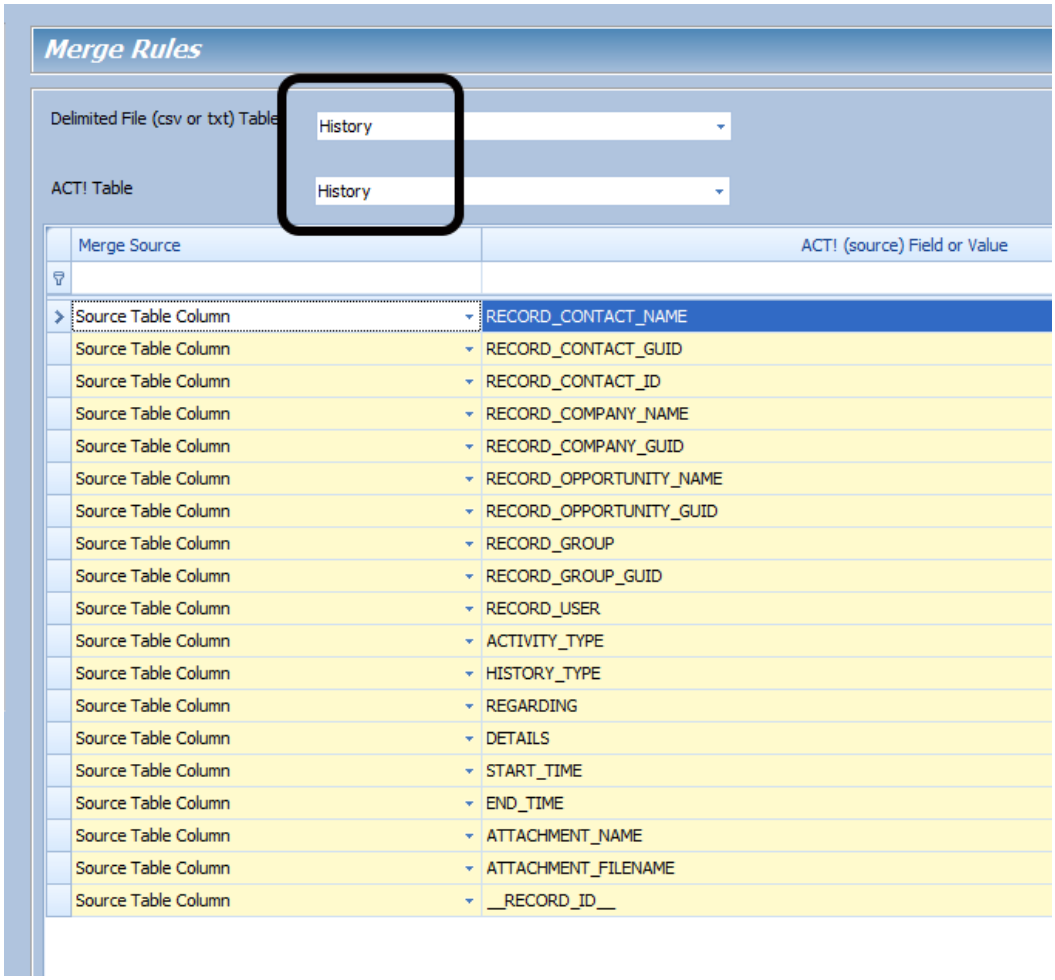

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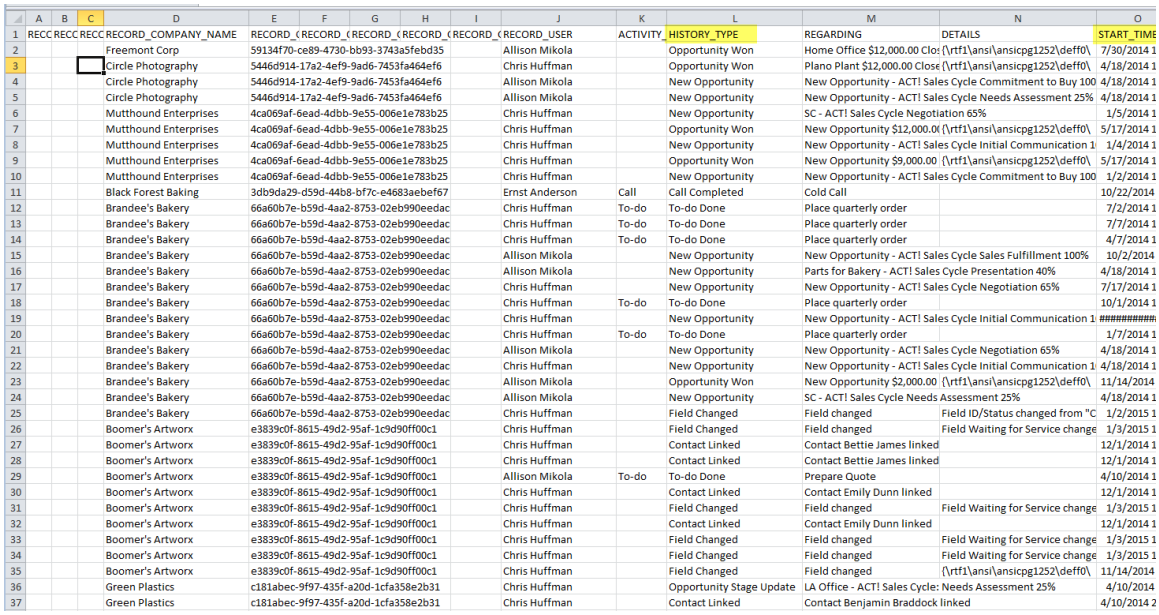
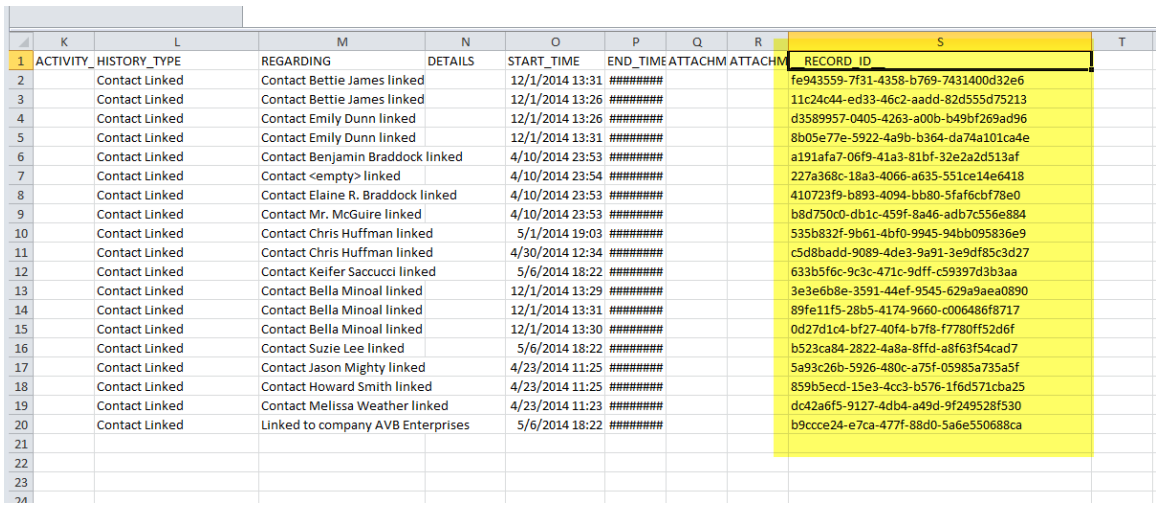
Open the output file in excel. Delete the rows you want to keep in Act! Create a new CSV with only the rows you wish to delete.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	RECC	RECC	RECC	RECORD_COMPANY_NAME	RECORD_(	RECORD_(	RECORD_(	RECORD_(	RECORD_(	RECORD_USER	ACTIVITY_	HISTORY_TYPE	REGARDING	DETAILS	START_TIME
2				Freemont Corp	59134f70-ce89-4730-bb93-3743a5febd35					Allison Mikola		Opportunity Won	Home Office $12,000.00 Clos	{\rtf1\ansi\ansicpg1252\deff0\	7/30/2014 1
3				Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Chris Huffman		Opportunity Won	Plano Plant $12,000.00 Close	{\rtf1\ansi\ansicpg1252\deff0\	4/18/2014 1
4				Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Allison Mikola		New Opportunity	New Opportunity - ACT! Sales Cycle Commitment to Buy 100		4/18/2014 1
5				Circle Photography	5446d914-17a2-4ef9-9ad6-7453fa464ef6					Allison Mikola		New Opportunity	New Opportunity - ACT! Sales Cycle Needs Assessment 25%		4/18/2014 1
6				Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	SC - ACT! Sales Cycle Negotiation 65%		1/5/2014 1
7				Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		Opportunity Won	New Opportunity $12,000.0(	{\rtf1\ansi\ansicpg1252\deff0\	5/17/2014 1
8				Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	New Opportunity - ACT! Sales Cycle Initial Communication 1		1/4/2014 1
9				Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		Opportunity Won	New Opportunity $9,000.00	{\rtf1\ansi\ansicpg1252\deff0\	5/17/2014 1
10				Mutthound Enterprises	4ca069af-6ead-4dbb-9e55-006e1e783b25					Chris Huffman		New Opportunity	New Opportunity - ACT! Sales Cycle Commitment to Buy 100		1/2/2014 1
11				Black Forest Baking	3db9da29-d59d-44b8-bf7c-e4683aebef67					Ernst Anderson	Call	Call Completed	Cold Call		10/22/2014
12				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		7/2/2014 1
13				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		7/7/2014 1
14				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		4/7/2014 1
15				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	New Opportunity - ACT! Sales Cycle Sales Fulfillment 100%		10/2/2014
16				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	Parts for Bakery - ACT! Sales Cycle Presentation 40%		4/18/2014 1
17				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACT! Sales Cycle Negotiation 65%		7/17/2014 1
18				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		10/1/2014 1
19				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACT! Sales Cycle Initial Communication 1		##########
20				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman	To-do	To-do Done	Place quarterly order		1/7/2014 1
21				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	New Opportunity - ACT! Sales Cycle Negotiation 65%		4/18/2014 1
22				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		New Opportunity	New Opportunity - ACT! Sales Cycle Initial Communication 1		4/18/2014 1
23				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		Opportunity Won	New Opportunity $2,000.00	{\rtf1\ansi\ansicpg1252\deff0\	11/14/2014
24				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Allison Mikola		New Opportunity	SC - ACT! Sales Cycle Needs Assessment 25%		4/18/2014 1
25				Brandee's Bakery	66a60b7e-b59d-4aa2-8753-02eb990eedac					Chris Huffman		Field Changed	Field changed	Field ID/Status changed from "C	1/2/2015 1
26				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
27				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Bettie James linked		12/1/2014 1
28				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Bettie James linked		12/1/2014 1
29				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Allison Mikola	To-do	To-do Done	Prepare Quote		4/10/2014 1
30				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Emily Dunn linked		12/1/2014 1
31				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
32				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Contact Linked	Contact Emily Dunn linked		12/1/2014 1
33				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
34				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	Field Waiting for Service change	1/3/2015 1
35				Boomer's Artworx	e3839c0f-8615-49d2-95af-1c9d90ff00c1					Chris Huffman		Field Changed	Field changed	{\rtf1\ansi\ansicpg1252\deff0\	11/14/2014
36				Green Plastics	c181abec-9f97-435f-a20d-1cfa358e2b31					Chris Huffman		Opportunity Stage Update	LA Office - ACT! Sales Cycle:	Needs Assessment 25%	4/10/2014
37				Green Plastics	c181abec-9f97-435f-a20d-1cfa358e2b31					Chris Huffman		Contact Linked	Contact Benjamin Braddock linked		4/10/2014 2

Run another merge to Delete the history for the IDs in your edited file.



	K	L	M	N	O	P	Q	R	S	T
1	ACTIVITY_	HISTORY_TYPE	REGARDING	DETAILS	START_TIME	END_TIME	ATTACHM	ATTACHM	__RECORD_ID__	
2		Contact Linked	Contact Bettie James linked		12/1/2014 13:31	########			fe943559-7f31-4358-b769-7431400d32e6	
3		Contact Linked	Contact Bettie James linked		12/1/2014 13:26	########			11c24c44-ed33-46c2-aadd-82d555d75213	
4		Contact Linked	Contact Emily Dunn linked		12/1/2014 13:26	########			d3589957-0405-4263-a00b-b49bf269ad96	
5		Contact Linked	Contact Emily Dunn linked		12/1/2014 13:31	########			8b05e77e-5922-4a9b-b364-da74a101ca4e	
6		Contact Linked	Contact Benjamin Braddock linked		4/10/2014 23:53	########			a191afa7-06f9-41a3-81bf-32e2a2d513af	
7		Contact Linked	Contact <empty> linked		4/10/2014 23:54	########			227a368c-18a3-4066-a635-551ce14e6418	
8		Contact Linked	Contact Elaine R. Braddock linked		4/10/2014 23:53	########			410723f9-b893-4094-bb80-5faf6cbf78e0	
9		Contact Linked	Contact Mr. McGuire linked		4/10/2014 23:53	########			b8d750c0-db1c-459f-8a46-adb7c556e884	
10		Contact Linked	Contact Chris Huffman linked		5/1/2014 19:03	########			535b832f-9b61-4bf0-9945-94bb095836e9	
11		Contact Linked	Contact Chris Huffman linked		4/30/2014 12:34	########			c5d8badd-9089-4de3-9a91-3e9df85c3d27	
12		Contact Linked	Contact Keifer Saccucci linked		5/6/2014 18:22	########			633b5f6c-9c3c-471c-9dff-c59397d3b3aa	
13		Contact Linked	Contact Bella Minoal linked		12/1/2014 13:29	########			3e3e6b8e-3591-44ef-9545-629a9aea0890	
14		Contact Linked	Contact Bella Minoal linked		12/1/2014 13:31	########			89fe11f5-28b5-4174-9660-c006486f8717	
15		Contact Linked	Contact Bella Minoal linked		12/1/2014 13:30	########			0d27d1c4-bf27-40f4-b7f8-f7780ff52d6f	
16		Contact Linked	Contact Suzie Lee linked		5/6/2014 18:22	########			b523ca84-2822-4a8a-8ffd-a8f63f54cad7	
17		Contact Linked	Contact Jason Mighty linked		4/23/2014 11:25	########			5a93c26b-5926-480c-a75f-05985a735a5f	
18		Contact Linked	Contact Howard Smith linked		4/23/2014 11:25	########			859b5ecd-15e3-4cc3-b576-1f6d571cba25	
19		Contact Linked	Contact Melissa Weather linked		4/23/2014 11:23	########			dc42a6f5-9127-4db4-a49d-9f249528f530	
20		Contact Linked	Linked to company AVB Enterprises		5/6/2014 18:22	########			b9ccce24-e7ca-477f-88d0-5a6e550688ca	
21										
22										
23										

The only field you will map is the last column. __RECORD_ID__

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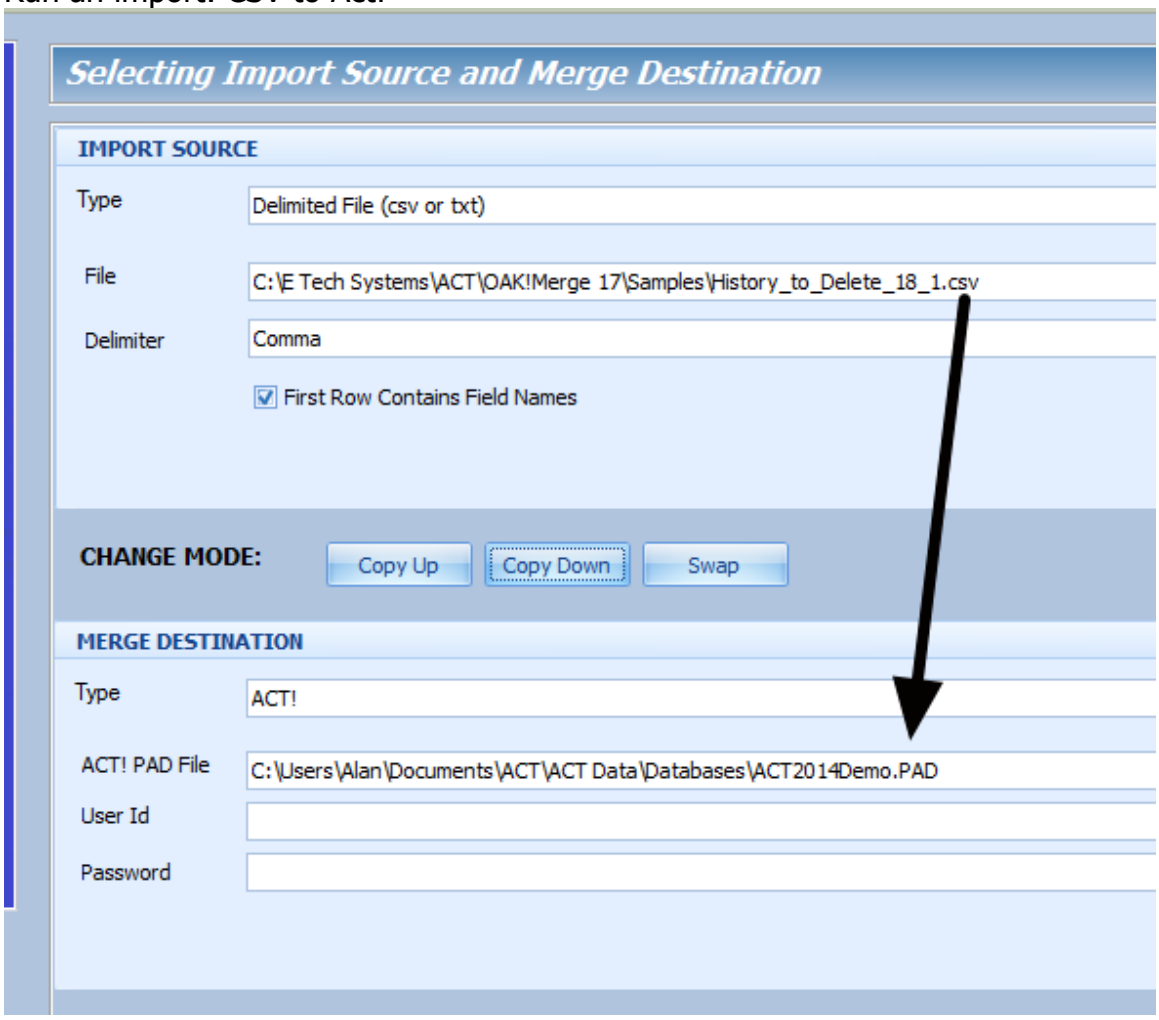
Run an import: CSV to Act!



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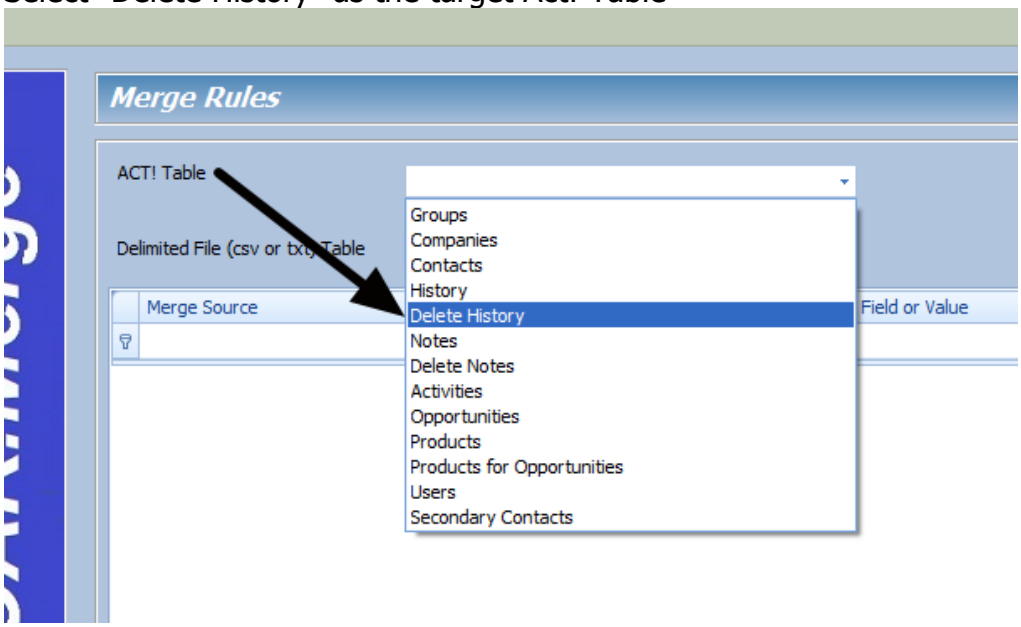
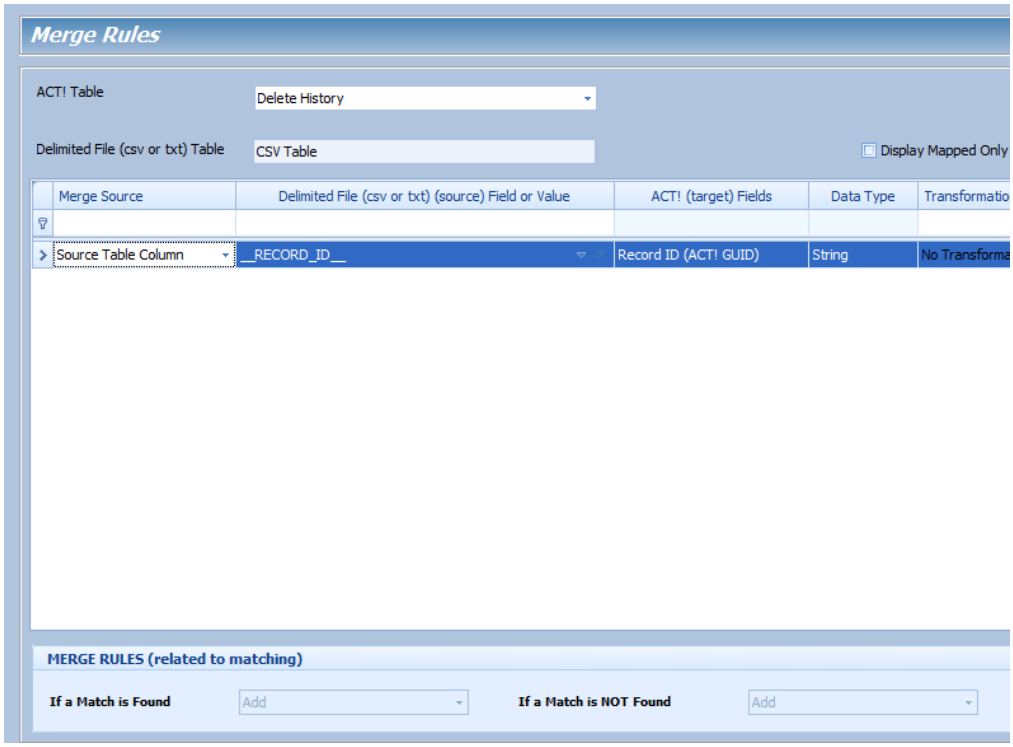
Select "Delete History" as the target Act! Table



Map the one field: __RECORD_ID__



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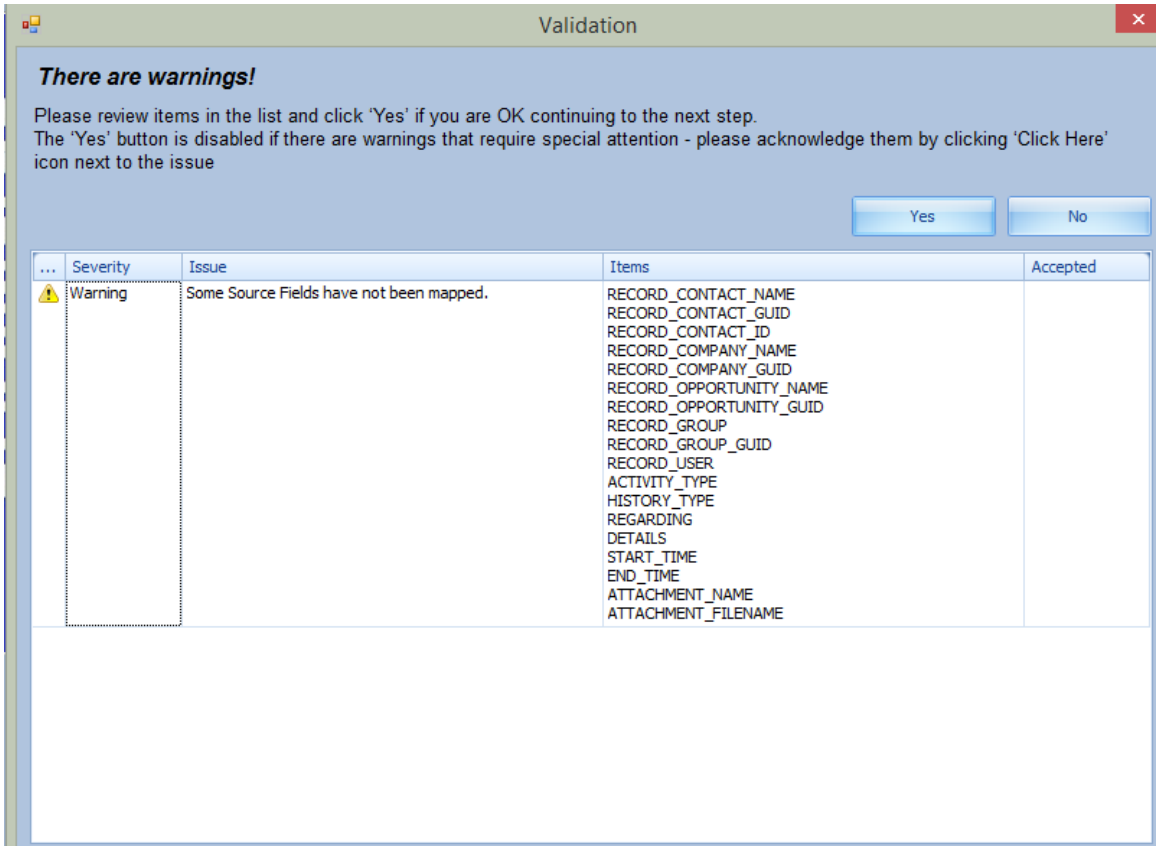
Clcik Yes for warnings that some field are not mapped.



Special Note: the results page will show "Added" instead of "Deleted". The counter seems off, but the deleting works correctly. OAK!Merge is internally adding the records to a special routine that deletes them. The counter is used for all merges and in this case, the results presented are not intuitive. Unfortunately it cannot be changed based on the type of merge. The records are deleted even though they are counted as "added".

NOTES are done the same way.
Export the Notes table, then pick the ones to delete, import to "Delete Notes" table.

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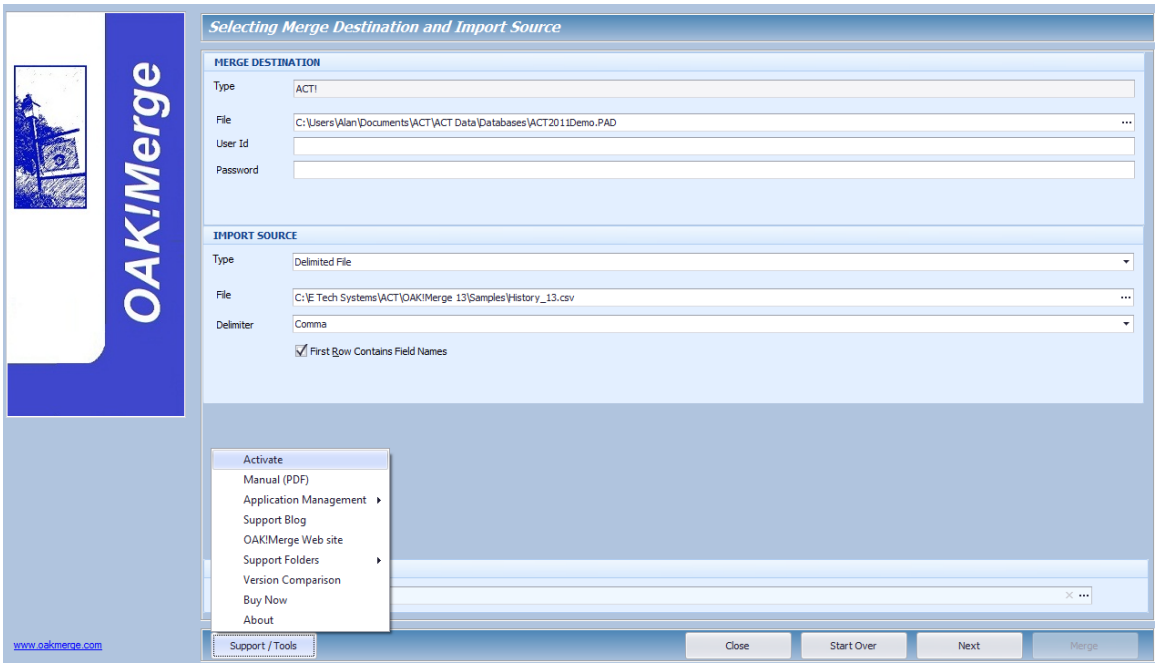
Section 4: Activation

Activation is required to unlock the software. It ties it to a specific PC. Upgrading to a newer version or to a more powerful version requires the purchase of a license. This license ID and password will activate the software so it will function.

Once you have your license ID and password, click on the Tools/Support button at the bottom of the wizard to activate the software.

Support/Tools, Activate



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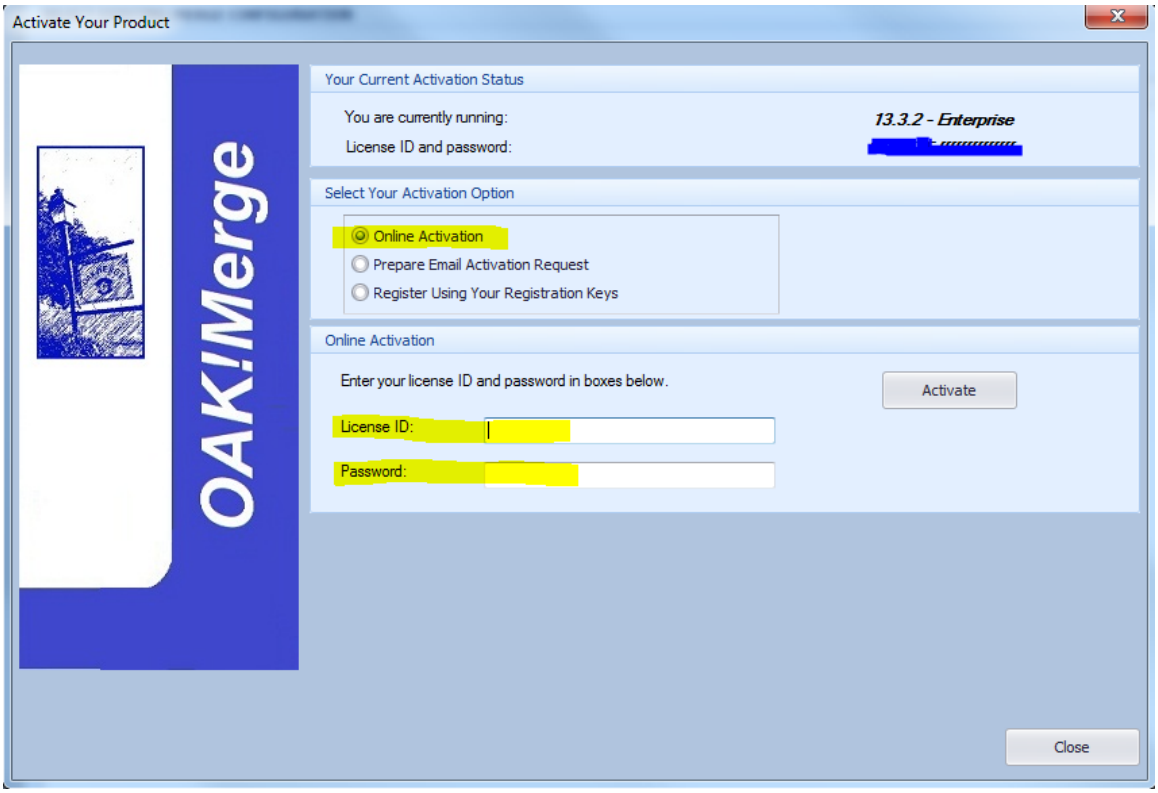
Fill in the License ID and Password from your registration email.



If the PC is on the Internet, leave on the Online Activation method and then click on the Activate button.

Note the OAK!Merge.UI.EXE will establish a TCP connection to the license server to activate the product. This may trigger a message from your personal firewall. Click on Allow.

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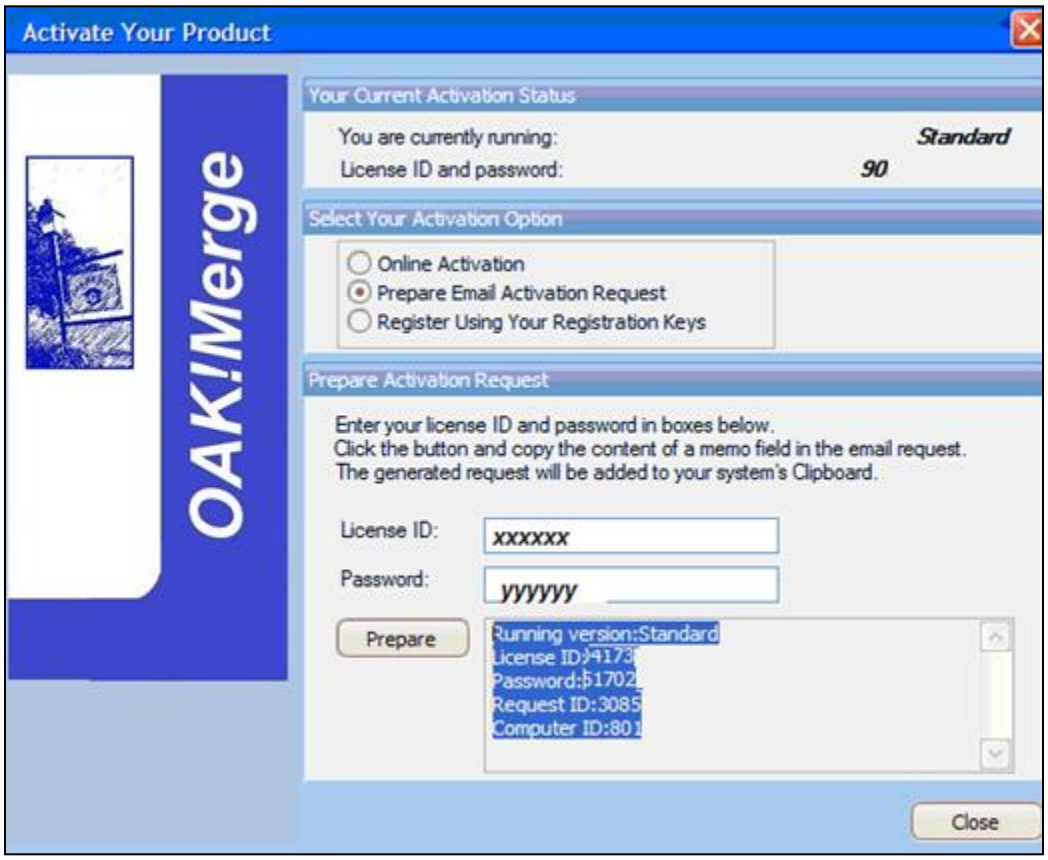
If you cannot get temporary Internet access you will need to send an email with an email activation request. In less than 24 hours you will receive a response with your registration keys. The registration keys are not required if you can complete the online activation.

Enter your License Id, and password and click on prepare.



Paste Email Activation Request info into an email and send to support@oakmerge.com with your name and purchase date.

Note: the manual email request above is NOT required if you can successfully do online activation.

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When you have successfully done an online activation or registered manually, you should get a: Activation succeeded message box

Your Current Activation Status
You are currently running:
Trial (expires on 12/15/2007)
License ID and password
Select Your Activation Option
Online Activation
Prepare Email Activation Request
Register Using Your Registration Keys
Online Activation
Enter your license ID and password in boxes below.
Activate
Activate Your Product
Activation succeeded.
You may need to restart your application to enable all features you have activated.
OK

You may have to close **OAK!Merge** and restart to use new features.

The Trial warning should be gone.

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Section 5: Support Policy

Oakhurst Software products offer no-charge technical assistance for installation support via email only. Free Phone support is not included in the purchase.

Many questions are installation and operating system related and best served by your dealer and/or an on-site consultant directly. The dealer who sold the software should be the first call for support.

Telephone Technical Support:

Access to OAK!Merge help desk line: Covers assistance with not only OAK!Merge Software, but data conversion, networking and most other related technical support issues. Call 847-352-4770 Monday through Friday 9:00 a.m. to 5:00 p.m. CST to request paid support.

Fee: Telephone Support is $170 per hour. 1/2 hour minimum.

Help desk accepts Visa, MasterCard, AMEX and Discover Card.

No-charge Email Technical Assistance related to installation is available for 90 days after purchase. This does not include training on how to use the products to fit your specific needs. The Technical Support team will attempt to answer emails within 1 business day of receipt, but will not guarantee response time.

Manual email activations requested for reasons such as moving the application to a new PC or reformatting the hard drive are available at no charge for the current version

Email Technical Support at: support@oakmerge.com

Use Tools/Support; Activation; email activation request to reactivate OAK!Merge on a different PC. You must uninstall OAK!Merge from the old PC, before installing and activating it on a new PC

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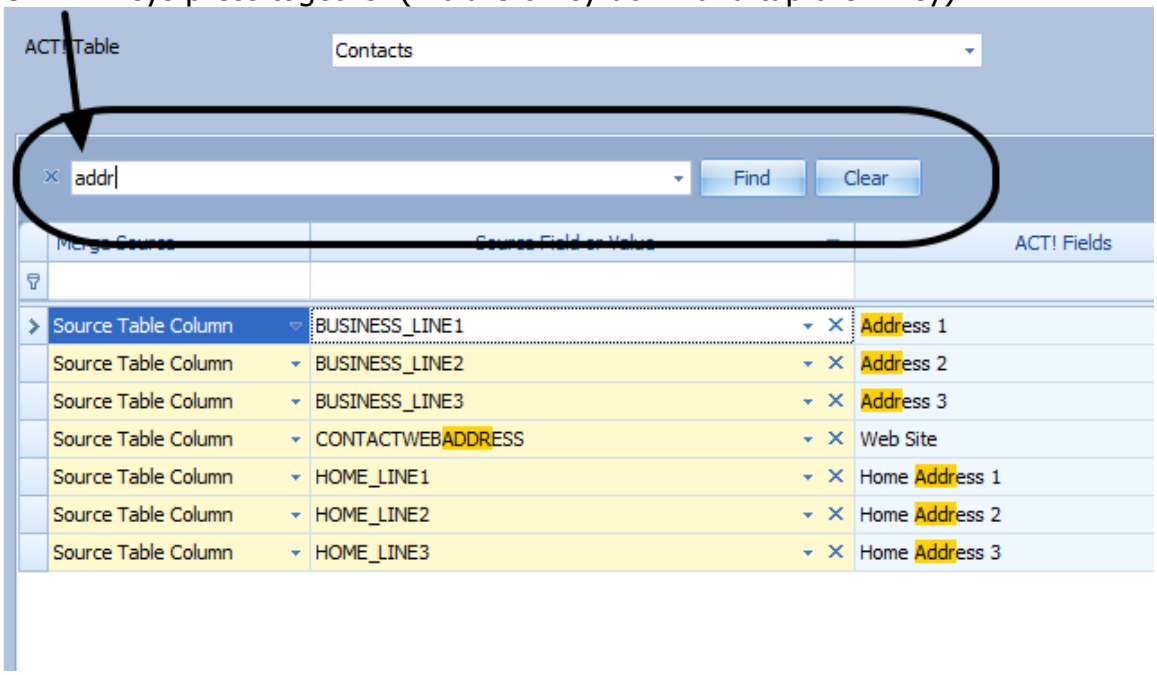
Section 6: Appendices

Appendix 1: Filters for Mapping view

Information displayed in the mapping screen can be filtered to display needed info. There is a Filter Row with active Filters on columns at the top of the Mapping screen. This is different than the CTRL- F feature to do a quick find of a word.

CTRL F keys press together (hold Crtl key down and tap the F key)



The Filter row allows filtering on some of the columns

Typing addr for the ACT fields will list only fields that contain addr

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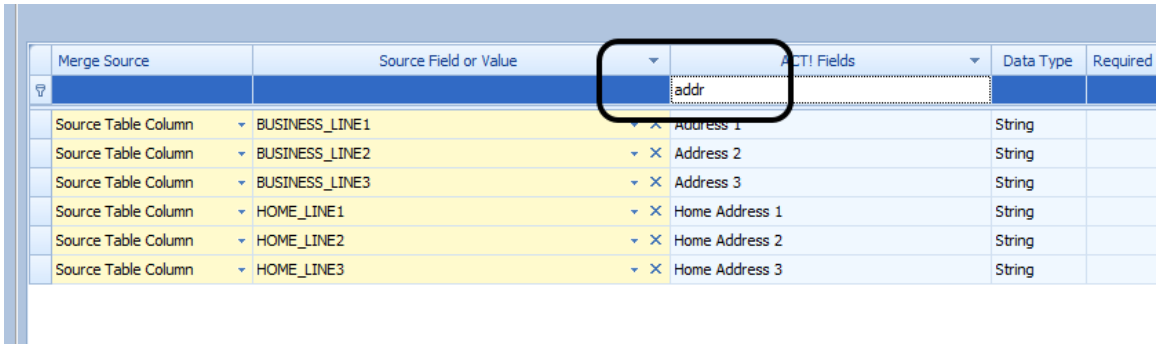
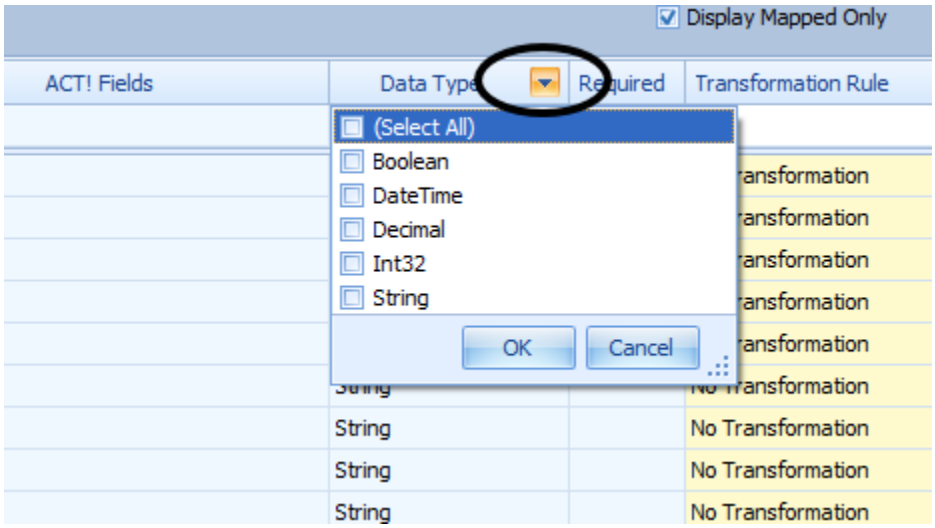


But the Data Type field uses a filer list to one or more possible values to be selected



TIP: Field names in the source file may be different in the mapping for OAK!Merge if needed. Since no blank or duplicate field/column names are allowed by OAK!Merge; any of those will changed.

The logic is if one or more columns match, then a number suffix is added to the dups: _1 _2. If you had 3 fields called STATE in your source, OAK!Merge would use STATE, STATE_1, STATE_3

If you see one or more Field# (# is the new column number in the source), then you can assume you had some rows of data not fall into the same column as other rows, … and some new columns were created. The data "walked…" and

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got pushed to the right into the wrong columns.

If there is NO header row exists, the fields will be Called Field1 Field2 Field3…

Appendix 2: Contact Name update rules: Pre fix, Suffix Suffix

Importing or updating Contact Names has some special rules because of the way Act! works. In Act! **y**ou enter Contact names, then Act! will guess at the First name, Middle name and Last name. If the first part of the contact name matches an item on the Act! list of Prefixes, it will be used as a Prefix, not a First name. If the last part of the contact name matches an item on the Act! list of Suffixes, it will be used as a Suffix, not a Last name. Users can manually override the choice name by Act! for First Name, Middle Name and Last Name.

Use Caution When Updating Contact Names: First Name, Last Name, Prefix, Suffix are **not** updatable fields. You can update the entire contact field, not parts of it. Use First Name, Middle Name and Last Name fields only when adding new contacts or replacing the entire contact field.

Users and OAK!Merge **CANNOT** pick or update how Act! parses the contact name.

When using an **OAK!Merge** action that updates the Contact field, **OAK!Merge** automatically updates the First Name, Last Name, and Salutation fields according to **Act!** Preferences for Names. This will over write any manual choices the user previously made for First name, Middle name , or Last name for that contact

Contact names can be blank, but a period is inserted as the last name as a place holder. It can be deleted in Act!."

TIP: the Prefixes and Suffixes MUST exist in the Name Preferences Lists in ACT

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Example import / test of Prefixes and Suffixes

TEST CSV FILE Contents as viewed in notepad

```
ID STATUS,Prefix,First Name,Middle Name,Last Name, Suffix,
P_TEST,1,2,3,4,5
P_TEST,Mr.,John,M,Smith,Jr
P_TEST,Dr.,Joe,b,Cool,III
P_TEST,Dr
P_TEST,,bob,,jones
```

Results in ACT
The row for "1,2,3,4,5" were not in the Name Preferences Lists in ACT and did not get into the Prefix/Suffix fields in ACT

Contact	Name Prefix	First Name	Middle Name	Last Name	Name Suffix
Dr .	Dr			.	
1 2 3 4 5		1	2 3 4	5	
Dr. Joe b Cool III	Dr.	Joe	b	Cool	III
bob jones		bob		jones	
Mr. John M Smith Jr	Mr.	John	M	Smith	Jr

Set the Prefixes and Suffixes Names lists in Act! under: Preferences, ADMIN TAB, "Name Preferences" Button

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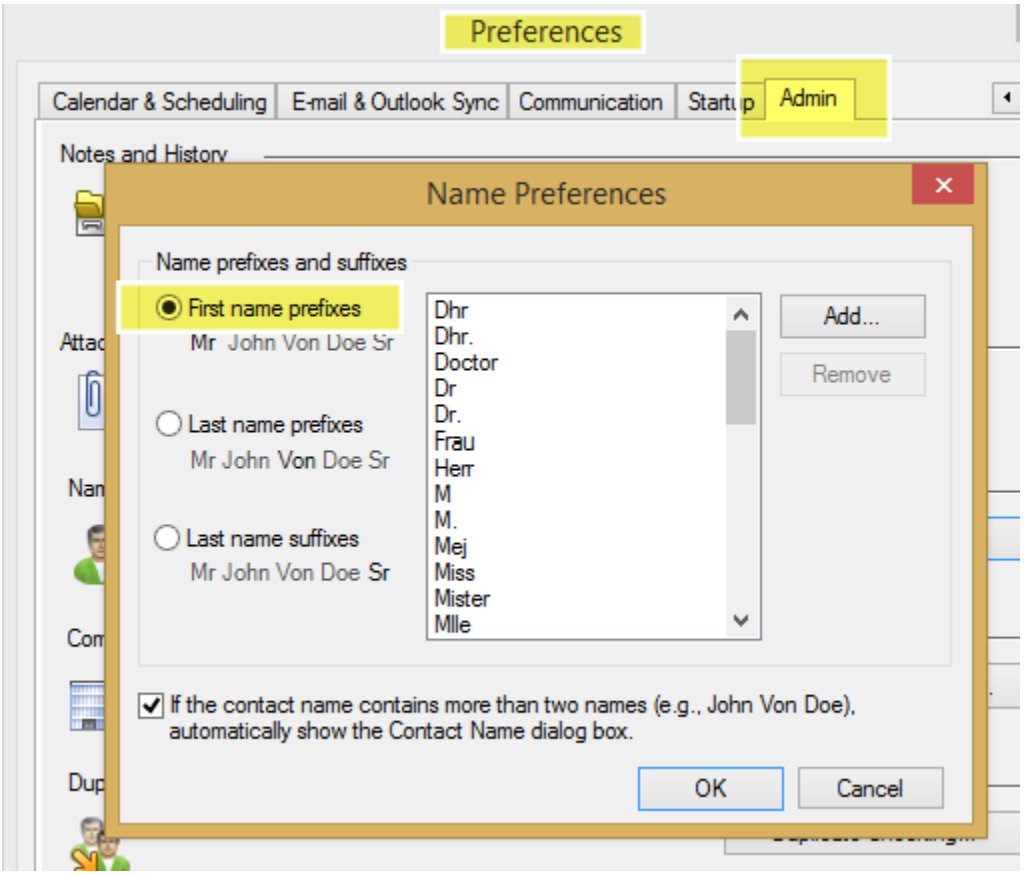

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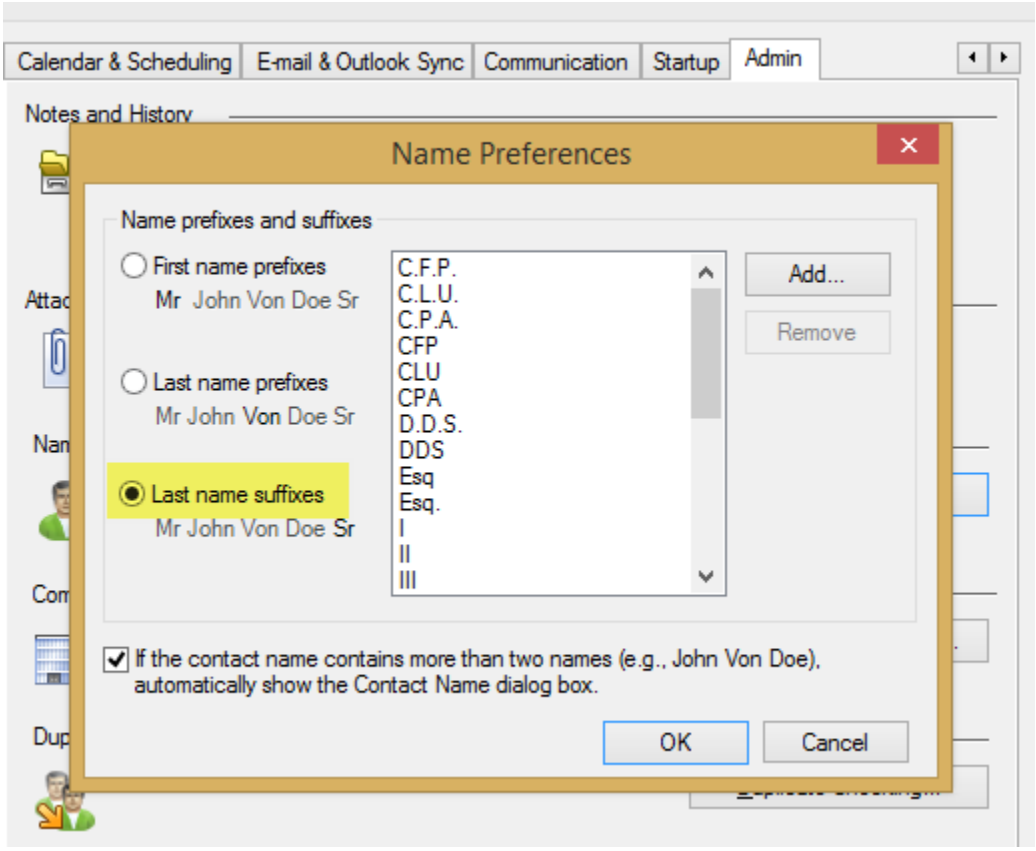

Appendix 3: Source and Destination path options: UNC and URL locations

Import Source and Merge Destination locations can be local paths, mapped drives, or UNC paths to networks shares such as
\\Server\data\ACTDATA\Contact_Info.csv
Appropriate permissions are required.

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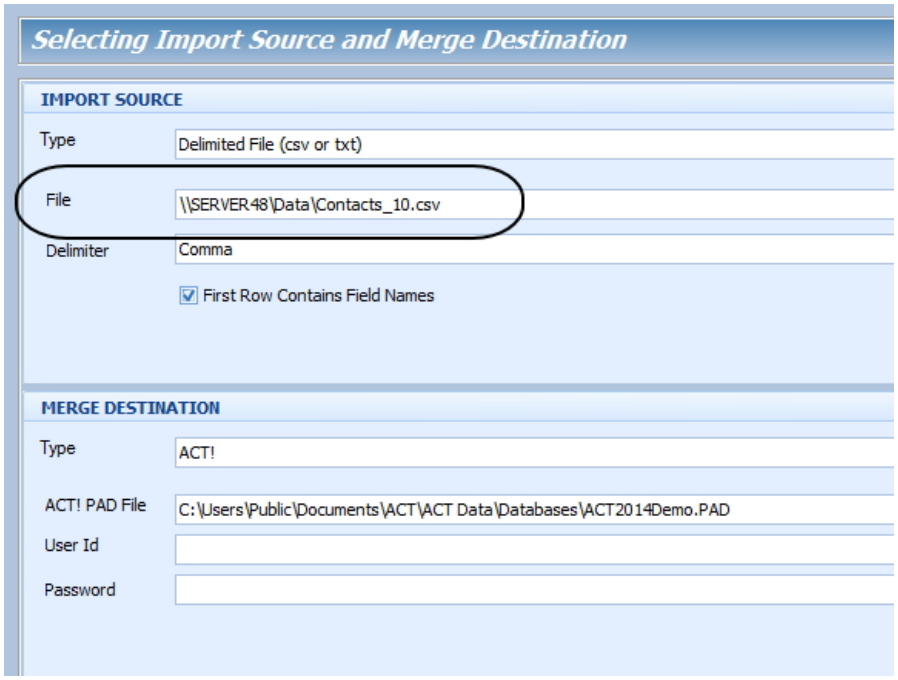
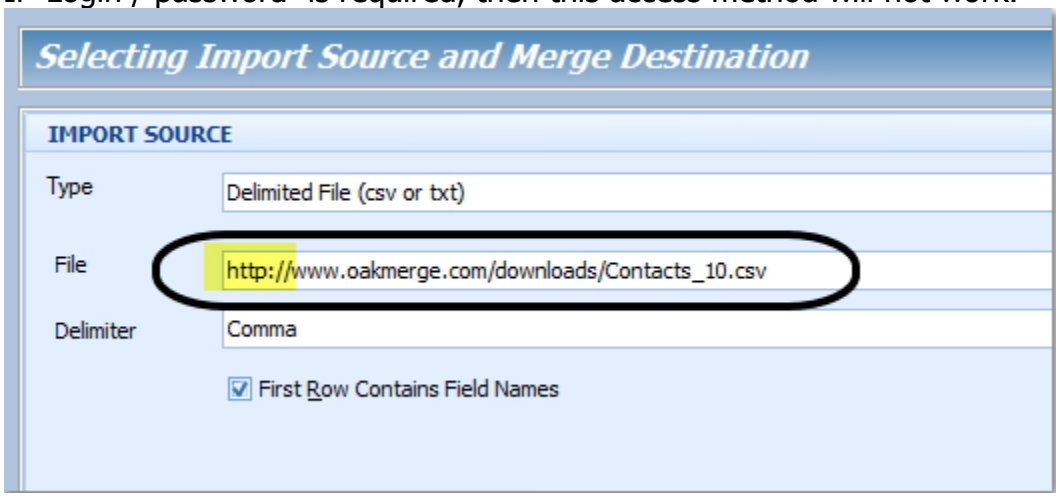


Import Source locations can also be a valid Web URL such as
http://www.oakmerge.com/downloads/Contacts_10.csv

If Login / password is required, then this access method will not work.



TIP: Web URL paths are often CASE Sensitive. http:// is required for a valid web url (HTTPS is currently not supported)

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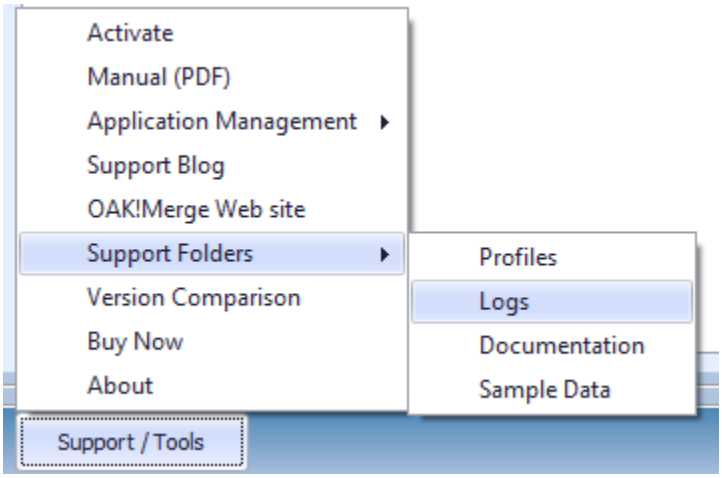
A path to an FTP resource is not supported.

Appendix 4: Log Files

Information from each merge is stored in the logs folder. The information in the results page is stored in a file ending in .htm and can be reviewed later. There are also the detailed logs ending in XML that have the details of each merge.

You can open and review them to see details of a merge operation.
The log files have the info on which records skipped, added, deleted, or merged when FULL LOGGING is selected as the logging level.



You can double click on them to see the results page of previous merges.

Tip: You can open the XML log with EXCEL to see which rows were Added, Merged, or Skipped. Look in column M or Subject.

	Level	LevelNumeri	LevelClass	Category	Subject	Details
19	Information	11	Information	Merge Execution	Record 18 was merged.	##########
20	Information	11	Information	Merge Execution	Record 19 was merged.	##########
21	Information	11	Information	Merge Execution	Record 20 was merged.	##########
22	Information	11	Information	Merge Execution	Record 21 was added.	##########
23	Information	11	Information	Merge Execution	Record 22 was added.	##########
24	Information	11	Information	Merge Execution	Record 23 was added.	##########
25	Information	11	Information	Merge Execution	Record 24 was added.	##########

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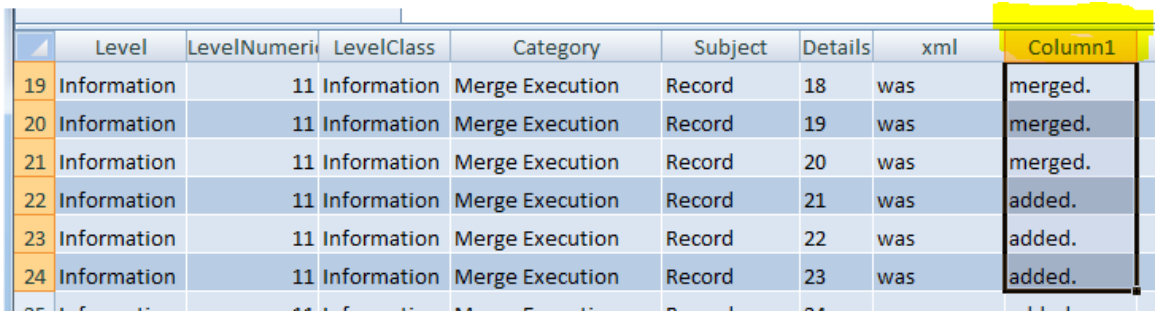
You can also use the Text to columns feature of EXCEL to split the Subject column into separate columns based on a delimiter of a space. This will give you the word Added, Merged, or Skipped in its own column.

After Text to Columns feature is used in EXCEL you have several new columns:



	Level	LevelNumeri	LevelClass	Category	Subject	Details	xml	Column1
19	Information	11	Information	Merge Execution	Record	18	was	merged.
20	Information	11	Information	Merge Execution	Record	19	was	merged.
21	Information	11	Information	Merge Execution	Record	20	was	merged.
22	Information	11	Information	Merge Execution	Record	21	was	added.
23	Information	11	Information	Merge Execution	Record	22	was	added.
24	Information	11	Information	Merge Execution	Record	23	was	added.

Sample log files from

C:\Program Files\E Tech Systems\OAK!Merge 12\Logs

Opened in Notepad

You can open the XML file in other programs or import into EXCEL to view.

---

batch3_200808200702.run.log

[2008-08-20 07:02:28:911 00000001] batch3: Loading profile

[2008-08-20 07:02:30:770 00000001] Validating the definition

[2008-08-20 07:02:30:802 00000001] Execution begins

[2008-08-20 07:02:31:270 00000001] Execution finishes

[2008-08-20 07:02:31:286 00000001] See detailed execution log at C:\Program Files\E Tech Systems\OAK!Merge 10\Logs\batch3_200808200702.htm: Execution complete

---

batch3_200808200702.xml

below shows 10 records from the source file were read and 4 new contacts were added while the 6 matched records were NOT updated. They were set to skip on match in the stored profile.

You can open the XML file in other programs or import into EXCEL to view.

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----------SNIP Below is from the end of the XML file----------

<Subject>Import for table Contacts has completed with warnings.</Subject>

<Details xml="**Y**"><EndTableProcessing> <Table table="Contacts" sourceTable="CSV Table" /> <Numbers tgtRows="179**" rowsProcessed="10"> <ByStatus noErrors="9" withWarnings="1" withErrors="0" /> <ByAction added="4"** updated="0" deleted="0" skipped="6" dedupedFromSource="0" /> </Numbers> </EndTableProcessing></Details>

</LogEntry>

- <LogEntry>

<RequestThread>00000001</RequestThread>

<RequestThreadIndex>0</RequestThreadIndex>

<RequestDate>2008-08-20</RequestDate>

<RequestTime>07:02:31:270</RequestTime>

<RequestThreadIdentity />

<Level>Information</Level>

<LevelNumeric>11</LevelNumeric>

<LevelClass>Information</LevelClass>

<Category>Merge Controller</Category>

<Subject>Merge process successfully finished.</Subject>

<Details />

</LogEntry>

</xmlLog>

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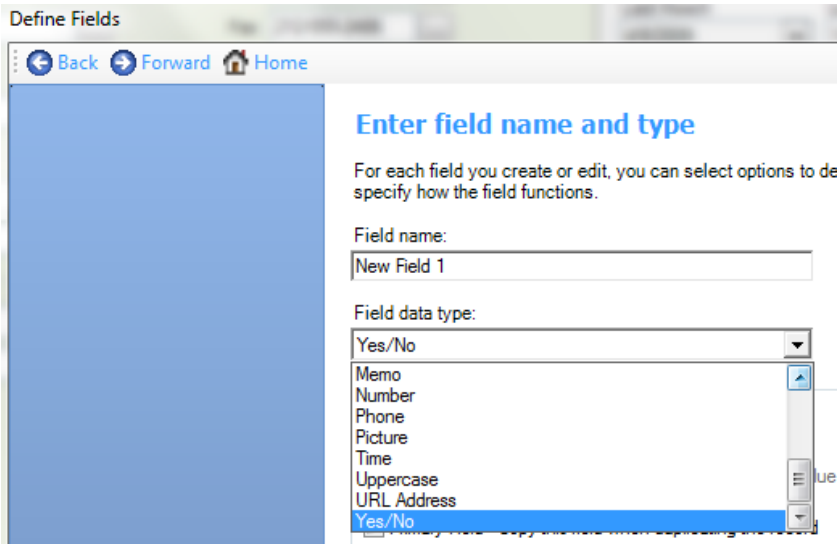
Appendix 5: Valid Data and Formatting for various Data Types

OAK!Merge can successfully process data which is in ASCII or UTF-8 format.

A file with an invalid UTF-8 character may not be readable by OAK!Merge. Data corruption can include this type of problem as well as other issues.

Valid data formats for data types are controlled by what Act! will accept.



ACT has these data types for fields that OAK!Merge can update

Characters, Initial-Caps, Lowercase, Uppercase, Address, and email: These are plain text fields with no formatting. The data must be printable characters. If the source is too long, it will be truncated and the first part used. A warning is logged if warnings or full logging is selected.

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Currency and Numbers:
Currency and numbers fields will accept positive and negative numbers. Do not use commas or $ dollar signs.

123.45
50000
10
(22.22)
-33.33
-4

Yes/No:
Yes/No fields are for Checkboxes. They are Boolean for the condition: are they checked? Yes or no?

Yes	Y	1	True
No	N	0	False

Memo:

Holds up to 64,000 Characters

Date:

USA Settings are
12/31/2003 1/22/1996 07/04/1776

Date /Time:

Examples: 12/31/2003 23:58 1/22/1996 3PM

Decimal:

Examples: 5 4.333 12345678

Phone

Dashes, no local country code
Examples: 312-555-1212 44-7-301-225

Time:

HRS:MIN:SEC
22:55:44 6:10 06:55:00

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URL:

URL are entered as a text string
www.CHTechONE.com www.oakmerge.com

OAK!Merge does not currently update these data types in Act!

- Calculated Field
- Annual Event
- Picture
- Public / Limited Access lists

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Appendix 6: Updates and Upgrades

Updates are free and upgrades have a small cost. Updates are minor feature updates and bug fixes. Free Updates are provided for the current version of OAK!Merge. Upgrades have new features and are redone to work with the latest version of Act!

Maps can be used with newer versions. Mappings are XML files in the profiles folder of the previous version. They are not deleted when you upgrade, but can be manually copied to the new location

A Typical copy of Profies and mappings for a v15 to v17 upgrade would be from to:

C:\E Tech Systems\ACT\OAK!Merge 15\Profiles
C:\E Tech Systems\ACT\OAK!Merge 17\Profiles

TIP: Update to the newest version you are licensed for: 10 11 12 13 14 15 16 or v17… Those downloads are at www.oakmerge.com

Past Major Versions and their last update

16.1.1
15.5.2
14.5.2
13.3.3
12.4.3
11.1.4

You can purchase upgrades to the current version from your consultant or online at www.oakmerge.com

Send suggestions and corrections to support@oakmerge.com

This manual and additional lab exercises are being updated regularly. The Support blog has updates, news, tips and support questions and answers you can search: Updates and the support blog are at:

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www.oakmerge.com

Or in OAK!Merge under Tools/Support, Documentation, Online.

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Support Blog

OAK!Merge Software News and Support
News, Tips, and support knowledgebase for OAK!Merge Import Export Tool for ACT!
About Oakhurst Software Products
OAK!MERGE 17.1.1 for ACT! was released today
Posted by: alanmlee | October 17, 2014
Search
Enhancements included in OAK!Merge 17.1.1
1. Supports the new ACT v17: PRO, PREMIUM, and Web versions
2. Export the Group Names linked to contacts and opportunities. This adds a new field to the contact and opportunity table exports called __Groups__ This new field contains the comma delimited names of the all the groups each contact or opportunity is a member of. Both Static and Dynamic group memberships are included.
3. Allows a double-click to open file dialog box or select the mapping to use
4. Import data directly from remote web sites. v17 Supports WEB URL as a path to a source file. Source files can now be on a website. A an example is http://www.oakmerge.com/downloads/Contacts_10.csv (note: path is case-sensitive)
5. Supports constants as a matching field. This is useful if you have several matching criteria, but not all are columns in the source data.
CATEGORIES
Select Category
ARCHIVES
• October 2014
• June 2014
• September 2013
• May 2013
• March 2013
• December 2012
• October 2012
• September 2012
• August 2012
• April 2012

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Our Facebook page is at

http://www.facebook.com/pages/OAKMerge/285607537880

Appendix 7: Features Roadmap

Download the current version of this as a PDF at:
www.oakmerge.com/downloads/Oakmerge_Roadmap.pdf

Full size on next page or click here to download

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OAK!Merge™ - Features Roadmap

eTech Systems inc.

Data Import/Export utility for ACT! by Swiftpage

Blue Shading = NEW feature at this level!

Feature/Version	Trial	Basic	Standard	Advanced	Pro	Enterprise
Suggested Retail Price (SRP)	free	$149	$299	$399	$499	$995
Import data to these ACT! Tables						
Contacts	Y	Y	Y	Y	Y	Y
Companies	Y	Y	Y	Y	Y	Y
Groups	Y		Y	Y	Y	Y
History (Append only)	Y		Y	Y	Y	Y
Notes (Append only)	Y		Y	Y	Y	Y
Opportunity	Y			Y	Y	Y
Activity (Append only)	Y			Y	Y	Y
Products	Y			Y	Y	Y
Custom Tables (10.2+)	Y				Y	Y
Secondary Contacts	Y				Y	Y
Users	Y				Y	Y
Export these ACT! Tables to CSV or XML						
Contacts (with Group Memberships)	Y		Y	Y	Y	Y
Companies	Y		Y	Y	Y	Y
Groups	Y		Y	Y	Y	Y
History (with IDs they are linked to)	Y		Y	Y	Y	Y
Notes (with IDs they are linked to)	Y		Y	Y	Y	Y
Opportunity (with Group Memberships)	Y			Y	Y	Y
Activity (with IDs they are linked to)	Y			Y	Y	Y
Products	Y			Y	Y	Y
Custom Tables (v10.2+)	Y				Y	Y
Users	Y				Y	Y
Source options to read data from						
Text Delimited: CSV or TAB or URL	Y	Y	Y	Y	Y	Y
ACT (One table at a time, see manual)	Y		Y	Y	Y	Y
MS Access (2000-2013)	Y			Y	Y	Y
Excel (2000-2013)	Y			Y	Y	Y
XML (Simple Table Format)	Y			Y	Y	Y
Salesforce Data Migration Kit	Y					Y
Features						
Write 10 rows per merge in free trial	Y					
Unlimited writes to unlimited databases	Y	Y	Y	Y	Y	Y
Save Mappings	Y	Y	Y	Y	Y	Y
Create Division to Company Hierarchy	Y	Y	Y	Y	Y	Y
Add Contacts to a static group	Y	Y	Y	Y	Y	Y
Create SubGroup to Group Hierarchy	Y		Y	Y	Y	Y
Save Profiles (with mappings)			Y	Y	Y	Y
Export active tables to CSV or XML files	Y		Y	Y	Y	Y
Unattended execution via scheduler				Y	Y	Y

Upgrade Costs from prior versions ($75 minimum)

		$149	$299	$399	$499	$995
SRP						
Upgrade from previous version	25%	$75	$75	$100	$125	$249
Upgrade from older versions	50%	$75	$150	$200	$250	$375

For more information, please visit

www.oakmerge.com

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This information is subject to change without notice; revised 12/14/2014

1-847-352-4770

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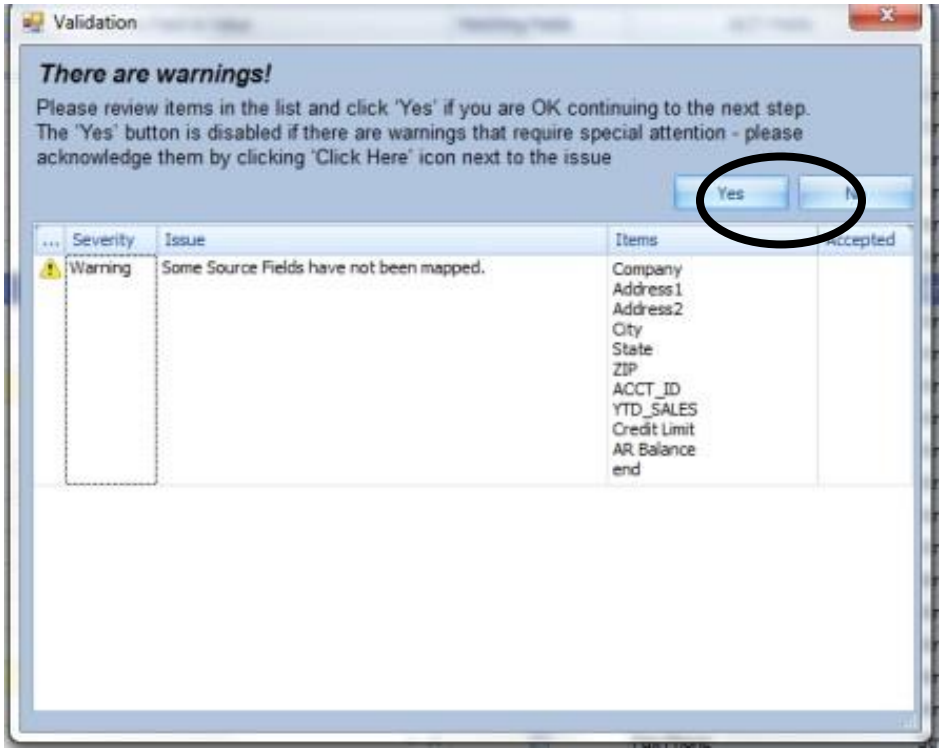
Appendix 8: Errors and Warnings

Several Error and Warning messages can be displayed when leaving the mapping page.

There may be many fields in a source file. You do not have the map/use all of them. Some are required. That varies by which table you are working with and weather you are adding, skipping, or updating; or not matching at all, which is adding/appending rows. For example, if you are updating and skipping Contacts you do NOT have to map the contact field, but if you ADD and contacts; you must map the contact field; even if all the contact names are blank.

If you do not map some of the fields in the source; you will get a warning: "Some fields have not been mapped"



You can click the "Yes" button and proceed to the next step (run) or No to return to the mapping screen.

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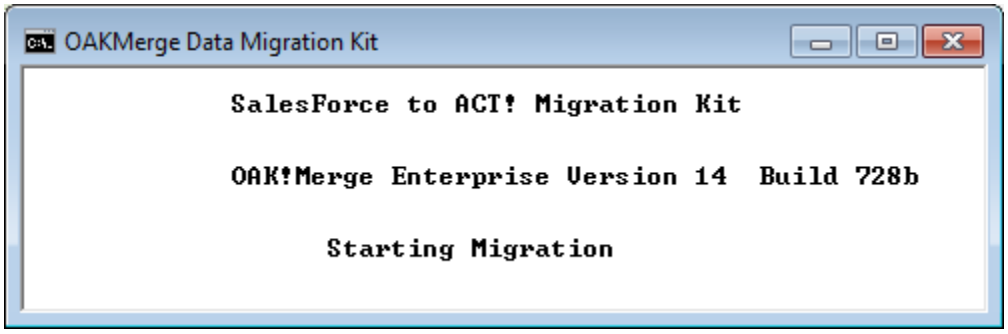
Appendix 10: SalesForce Data Migration Kit / Enterprise Edition

The SalesForce data migration kit converts a standard backup ZIP from Salesforce into an Act! database
The SalesForce data migration kit includes all the SalesForce users, accounts, contacts, leads, tasks, activity history,notes, opportunities, and attachments. All this in a load and go, one click utility: OAK!Merge Enterprise. The SalesForce Data migration kit has a separate manual with a step by step check list.

It is a simple three step process:

1. Download and install the OAK!Merge Enterprise Edition with SalesForce Migration Kit.
2. Unzip the contents of a full backup with attachments from SalesForce
3. Click Launch to Go!

The standard versions of SalesForce for Contact, Group, Professional, and Enterprise work with the Migration kit. However not all versions of SalesForce have been mapped or tested. Special editions such as the Wealth Management or Not for profit editions of SalesForce have not been tested and will probably need adjustments to the standard field mappings supplied. OAK!Merge


OAKMerge Data Migration Kit
SalesForce to ACT! Migration Kit
OAK!Merge Enterprise Version 14 Build 728b
Starting Migration

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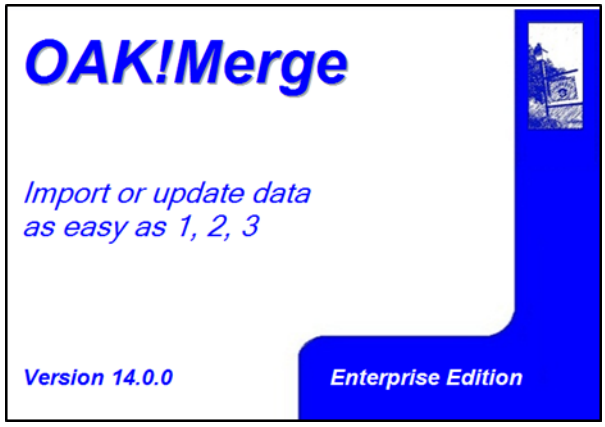

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OAK!Merge Enterprise with SalesForce Data Migration kit:

- Uses a standard data backup ZIP from SalesForce containing over 40 files and all the attachments.
- Imports the Users from SalesForce and creates Act! users, so the record managers in Act! will match the Owners in SalesForce.
- Converts the Accounts in SalesForce to Companies in Act!
- Converts the Contacts in SalesForce to Contacts in Act! and links them to the Companies.
- Also converts the future tasks, activity history, opportunities, and attachments
- Includes all OAK!Merge Pro version features for use after the migration

What the SalesForce Data Migration kit brings in from SalesForce:

- SalesForce users
- accounts
- contacts
- leads
- opportunities
- tasks
- events
- activity history
- notes
- attachments

Each migration kit includes 1 hour of telephone support for setup and conversion efforts. Custom conversion support is available from Act! Consultants worldwide for an additional fee. The data migration kit does not import custom fields, hierarchies, reports, documents, cases, policies, or households. This type information can be imported by OAK!Merge Pro which is included. OAK!Merge Pro is an advanced powerful data import tool for technical users and consultants.

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